VERSION 5.2

USER'S GUIDE
FOR WINDOWS 32-BIT

# GroupWise™

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# Getting Started

# Welcome to GroupWise

GroupWise® is software that works to meet all your messaging, scheduling, calendaring, and document management needs.

## Starting GroupWise

Before you can begin using GroupWise, you must run the GroupWise Setup program. The Setup program wizard will take you step-by-step through the setup process.

### Running the Setup Program

1. Contact your system administrator for the location of the GroupWise Setup program, SETUP.EXE. You need to know the location of the program before continuing.
2. Make sure you are logged in as yourself on your computer.
3. Click Start ▸ Run.
4. Type the path to the GroupWise SETUP.EXE program ▸ click OK.
5. Follow the instructions in the Setup program.

### Starting GroupWise

1. Double-click  your desktop.

   The GroupWise Main Window displays. See *A Brief Tour of GroupWise* under *Getting Started* for more information about the Main Window.

## Getting Help

If you have trouble using GroupWise, you can get help from several sources. The online Help is available from wherever you are in GroupWise. In addition to online Help, you can find answers to your questions in the Cool Solutions magazine which is available on the Web.

### Using Online Help

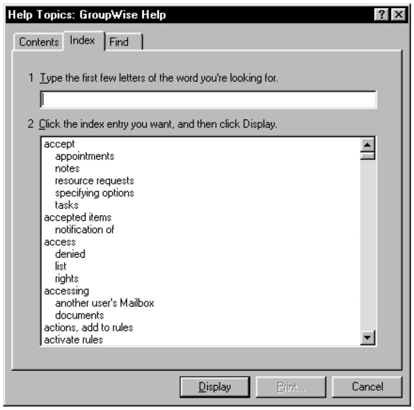
The GroupWise Client documentation is available online. A variety of access methods into online Help are provided so you can pick which method suits your needs.

**How Do I** ◆ Lists help topics organized by related tasks.

1 Click Help ▸ Help Topics ▸ Contents ▸ double-click How Do I.

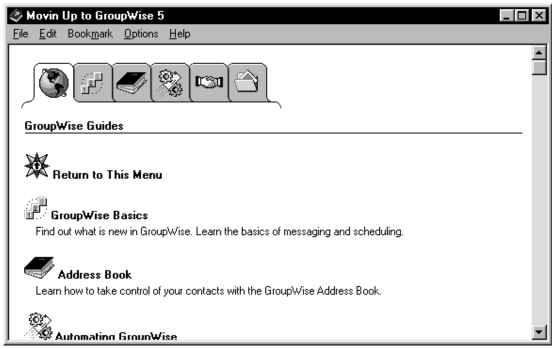

**Index** ◆ Displays keywords to help you find information, much like an index in a book.

1 Click Help ▸ Help Topics ▸ the Index tab.



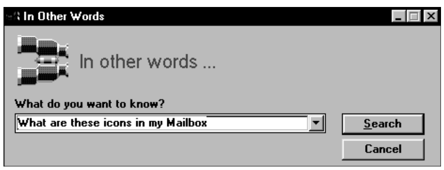

**Guides** ◆ Walks you through a task or series of tasks to help you learn GroupWise features. You may simply read the instructions in the guides if you'd rather not perform the steps.

**1** Click Help ▸ Guides.



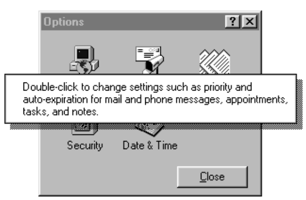

**In Other Words** ◆ Lets you type a word, a phrase, or a question using your own terminology and displays help topics that are related. This is especially useful when you're not sure of the name of a feature.

**1** Click Help ▸ In Other Words.



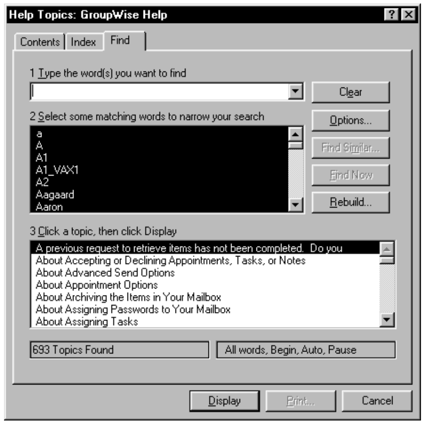

**Context-Sensitive Help** ◆ Displays a brief explanation about any option in a dialog box.

**1** In a dialog box, click  ▸ click an option.




**Find** ◆ Lets you type specific words or phrases and displays help topics containing those words or phrases.

**1** Click Help ▸ Help Topics ▸ the Find tab.




**Using Cool Solutions Magazine**

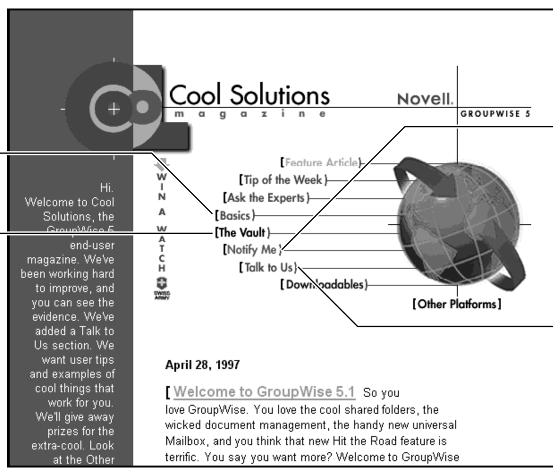
Cool Solutions is an online Web magazine devoted to helping you learn all about GroupWise. In the magazine you'll find helpful tips and regular feature articles that give you all the details about using GroupWise. In addition, you'll find resources such as downloadable QuickStart Cards and demos that will help you get started using GroupWise. Here is a sample of what you'll find.

### Opening Cool Solutions ◆

**1** In your web browser, type www.gwmag.com.

*Click Basics to learn the fundamentals of GroupWise.*

*Click The Vault to read previous issues of the magazine.*




*Click Notify Me to be notified each time a new feature article is available.*

*Click Talk to Us and send your feedback about GroupWise.*

### Sending Your Questions to the GroupWise Experts ◆

Ask the Experts is your forum to ask questions about GroupWise. If you're wondering how to do something in GroupWise, such as share folders, print a calendar, and so on, and you can’t find it in the documentation, send your question to the experts.

1 In your web browser, type www.gwmag.com.

2 Click Ask the Experts ▸ Ask Us.

3 Click Ask the Cool Solutions Experts.

Depending on the size of your monitor, you may need to scroll to find the Ask the Cool Solutions Experts link.


4 Type your information and your question.

5 Click Send.

**Downloading Resources from Cool Solutions** ◆ On the Downloadables page, you’ll find lots of resources that you can download and use in your organization. There are demos that show you how to use GroupWise, feature articles from the magazine, and a Quick Start Card to name just a few.

1 In your web browser, type www.gwmag.com.

2 Click Downloadables.

3 Click the item you want to download, then follow the instructions.

# A Brief Tour of GroupWise

GroupWise integrates all your messaging, scheduling, calendaring, and document management needs into one place.

## The Main Window

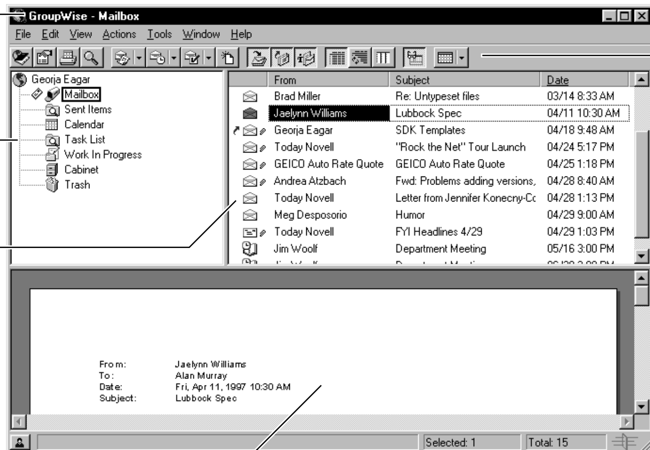
The Main Window is your “home base” for GroupWise. From the Main Window you can read your messages, schedule appointments, view your Calendar, open documents, and much more.

*Long prompts appear in the title bar describing each menu item.*

*Folder List*

*Item List*

*Toolbar*




*QuickViewer lets you read messages in your Mailbox without opening them in a separate window.*

You can open more than one Main Window in GroupWise. This is useful if you proxy for another user. You can look at your own Main Window and the Main Window belonging to the person you are proxying for. You might also want to open a certain folder in one window and look at your Calendar in another. You can open as many Main Windows as your computer’s memory will allow.

The basic components of the Main Window are explained below.

### Toolbar

The toolbar lets you quickly accomplish common GroupWise tasks, such as opening the Address Book, sending mail messages, and displaying your Calendar. Point your mouse over any toolbar button and a tool tip displays the name of the feature.

### Folder List

The Folder List at the left of the Main Window lets you organize the items you send and receive. You can also create new folders to store your items in. Here is what you’ll find in each of the default folders:

Your user folder (indicated by your name) represents your GroupWise database. Your user folder contains other folders as well as items.

Your Mailbox includes all items you've sent and received. Use the toolbar buttons to view only sent items or received items.

Your Cabinet is a container for all your personal folders and shared folders.

Work In Progress contains unfinished messages. You can work on a message, then send it later. This folder also contains references to documents that have been opened or checked out.

The Trash contains all the items and documents you've deleted.

#### Item List

The Item List at the right of the Main Window displays your mail and phone messages, appointments, notes, tasks, and document references. Use the buttons on the toolbar to display incoming items, outgoing items, and personal items.

#### QuickViewer

The QuickViewer opens below the Item List box. You can quickly scan items in the QuickViewer rather than open each item in another window.

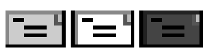
## Understanding Your Mailbox

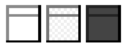
All of your items, whether you send or receive them, are stored in your GroupWise Mailbox on the network. You can quickly display only incoming items, outgoing items, personal items, or draft items by clicking the buttons on the toolbar. You can further restrict which items display in your Mailbox by using Filter. See *Filtering* under *Finding Items in Your Mailbox* for more information.

You can organize your messages by moving them into folders within your Cabinet.

### Icons Appearing Next to Items in Your Mailbox

Next to each item you receive is an icon that helps you understand a little about the item before you even read it. For example, you can determine the type of item (mail, appointment, and so forth) and its priority. You can also see whether the item has a file attached, whether an item you sent could not be delivered to some recipients, and more.

| Icon | Description |
|---|---|
|  | Appears next to an item you have sent. It indicates that GroupWise could not deliver the item to one or more recipients. |
|  | Appears next to a task or an appointment you have sent. Next to a task, it indicates that at least one recipient deleted the task without marking it Completed. Next to an appointment, it indicates that at least one recipient deleted or declined the appointment without accepting it. |
|  | Appears next to an item you have sent. Next to an appointment, it indicates that not every recipient has accepted the appointment. Next to a task, it indicates that not every recipient has completed the task. Next to other item types, it indicates that not all recipients have opened the item or that not all recipients have deleted the item. |
|  | Unopened mail message with a low, standard, or high priority. |
|  | Opened mail message with a low, standard, or high priority. |
|  | Unopened appointment with a low, standard, or high priority. |
|  | Opened appointment with a low, standard, or high priority. |
|  | Unopened task with a low, standard, or high priority. |

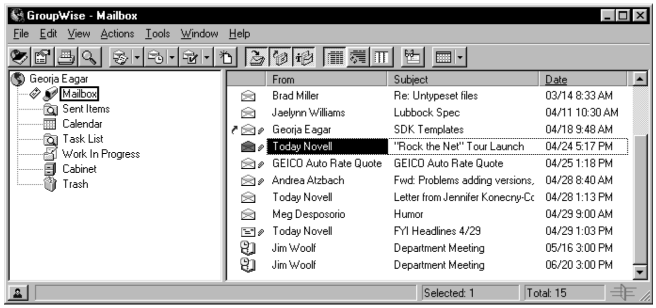
| | |
|---|---|
|  | Opened task with a low, standard, or high priority. |
|  | Unopened note with a low, standard, or high priority. |
|  | Opened note with a low, standard, or high priority. |
|  | Unopened phone message with a low, standard, or high priority. |
|  | Opened phone message with a low, standard, or high priority. |
|  | Unopened document with a low, standard, or high priority. |
|  | Opened document with a low, standard, or high priority. |
|  | The sender has requested that you reply to this item. The item can be a low, standard, or high priority. |

### Viewing Options in Your Mailbox

You can view the items in your Mailbox three different ways, depending on how you want the information organized. Details, Discussion Threads, and As Calendar are all found on the View menu.

**Details** ◆ Details displays a list of your items and information about them in columns, including Subject, Date, CC, Priority, Document Type, Due Date, Size, Version#, and many other categories. Details is the default Mailbox view if you have not changed your Mailbox properties.

**1** Click on the toolbar to view by Details.

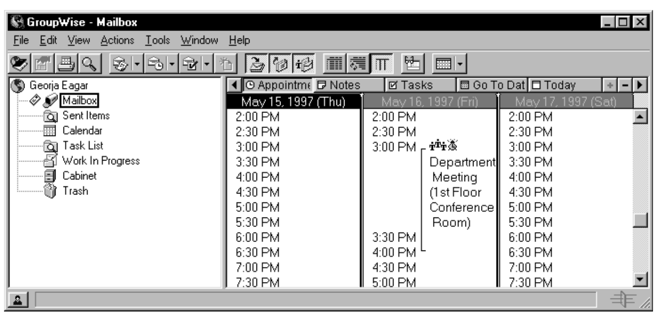



**Discussion Threads** ◆ Discussion Threads shows the e-mail discussion of an original item and all its replies grouped in hierarchical order.

**1** Click on the toolbar to view by Discussion Threads.


**As Calendar** ◆ As Calendar displays all scheduled items saved in a particular folder. This is useful if you organize all your appointments and other items for a specific project in one folder either manually or with rules.

**1** Click on the toolbar to view As Calendar.



## Using the Columns in Your Mailbox

The Item List in the Main Window is divided into columns. Each column displays information about the items in the list. For example, different columns display the subject of items, the date, and so forth. You can customize the column display for each folder in your Main Window by changing column widths, by adding or deleting columns, and by changing the order of columns. You can even define a different column display setting for each personal folder in your Folder List.

### Adding Columns to Your Mailbox

1 In the Main Window, open the folder you want to add columns to.

2 Right-click a column heading ▸ click a column title.

*or*

Right-click a column heading ▸ click More Columns ▸ a column in the Available Columns list box ▸ Add.

**Tips**

- You can select multiple columns to add by pressing Ctrl while you click columns.

### Changing the Order of Columns

1 In the Main Window, open the folder you want to change columns settings for.

2 Right-click a column heading ▸ click More Columns.

3 Click a column name in the Available Columns box.

4 Click Down or Up.

5 Click OK.

**Tips**

- You can also drag columns to new positions in the Main Window.
- You can define different column settings for each folder in your Mailbox in Properties.

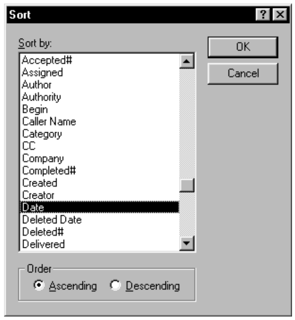
### Resizing the Columns in Your Mailbox

1 In the Main Window, click the folder you want to resize columns in.

2 Position the mouse pointer over the edge of a column heading until a two-headed arrow appears ▸ drag to resize the column.

### Sorting Column Items in Your Mailbox

1. Click the folder containing the items you want to sort.
2. Click View ▸ Sort.




3. Click the category you want to sort by in the list box.
4. Click Ascending to sort from A to Z.
   *or*
   Click Descending to sort from Z to A.
5. Click OK.

### Removing Columns from Your Mailbox

1. In the Main Window, open the folder you want to remove columns from.
2. Drag the column heading off the column bar.

## Using the Toolbar

Use the toolbar to access many of the features and options found in GroupWise. When you use certain features (for example, when you are in your Calendar), the toolbar for that feature appears.

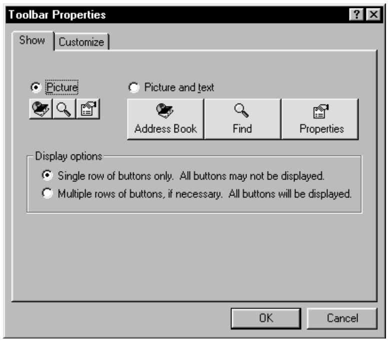
To find out about a toolbar button, move the mouse pointer over the button and read the tool tip that appears.

You can customize each toolbar by adding and deleting buttons, choosing button order, and placing separators between buttons. See *Customizing Your Toolbar* under *Customizing GroupWise*.

### Changing the Toolbar Display

1. If the toolbar is not displayed, click View ▸ Toolbar.
2. Right-click the toolbar ▸ click Properties.

**3** Click the Show tab.




**4** Choose how you want the toolbar to display ▸ click OK.

# Working with Items in Your Mailbox

# Sending and Receiving Items

Every day you communicate in a variety of ways. To accommodate these needs, GroupWise® delivers your items using a variety of item types. Each item type is explained below.

**Mail**
A mail message is for basic correspondence. You can use it for anything resembling a memorandum or letter.

**Phone Message**
A phone message helps you inform someone of a phone call or visitor. You can include such information as caller, phone number, company, urgency of the call, and so forth.

**Appointment**
An appointment lets you invite people to and schedule resources for meetings or events. You can schedule the date, time, and location for the meeting. You can use personal appointments to schedule personal events such as a doctor's appointment, a reminder to make a phone call at a certain time, and so forth. See *Scheduling Appointments* under *Scheduling Group and Personal Appointments*.

**Task**
A task lets you place a to-do item on your own or on another person's Tasks list. You can schedule a due date for the task and include a priority (such as A1). Uncompleted tasks are carried forward to the next day.

**Note**
A note is a reminder that you post on a specific date on your own or another person's Calendar. You can use notes to remind yourself or others of deadlines, holidays, days off, and so forth. Personal notes are useful as reminders for birthdays, vacations, paydays, and so forth.

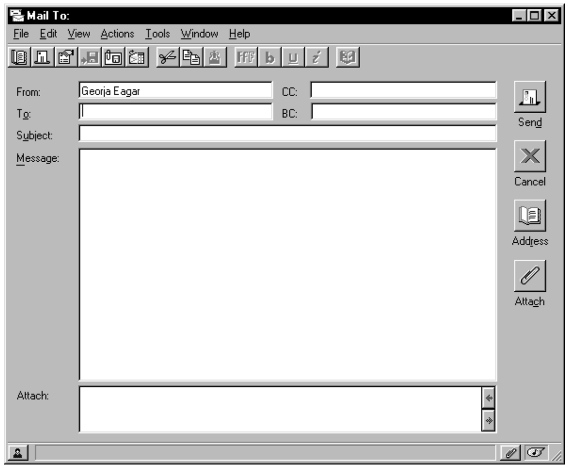
## Sending Mail Messages

A mail message is like an internal memorandum; it has a primary recipient, subject line, date, and can be carbon copied and blind copied to other users. You can also attach files, sounds, and movies.

**CC (Carbon Copy)**
Sends copies of an item to users who would benefit from the information, but who are not directly responsible for the information or directions in it. All recipients can see that a carbon copy was sent.

**BC (Blind Copy)**
Sends a copy of your item to a recipient without the knowledge of any of the other recipients. Only the sender and the blind copy recipient know that a blind copy was sent.

**1** Click  on the toolbar.




**2** In the To box, type a username ▸ press Enter. Repeat for additional users.

To select usernames from a list, click Address ▸ double-click each user ▸ click OK.

**3** Type a subject.

**4** Type a message.

**5** Click Send.

**Tips**

- You can specify a different default Mail view in Default Views Options. See *Setting Options for GroupWise* under *Customizing GroupWise*.
- You can specify many options, such as making a message a high priority, requesting a reply from the recipients, and more. See *Setting Options for GroupWise* under *Customizing GroupWise*.

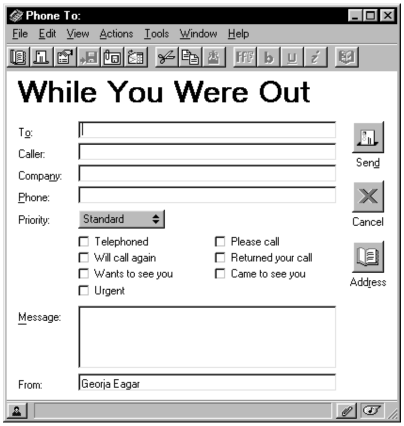
## Sending Phone Messages

A phone message is a note you can send to notify other GroupWise users of calls they received while they were out of the office or unavailable. Phone messages are stored in the recipient's Mailbox. If your organization has PhoneAccess, you can also place audio phone messages in the person's Mailbox. See *Using PhoneAccess* under *Using Your Phone with GroupWise*.

Phone Message is simply a view, like a Task or Mail view. You cannot answer your phone from a phone message. Use Conversation Place to manage your telephone directly from the GroupWise desktop. See *Using Conversation Place* under *Using Your Phone with GroupWise*.

You can change the phone messages you receive into tasks, notes, or other personal item views. This way, you can leave a record of the conversation on the date it was held (Note) or create a to-do item to complete at a later date (Task). See *Changing Item Types* under *Managing Received Items*.

1 Click File ▸ New ▸ Phone Message.




2 In the To text box, type the user's name.

As you type the user's name, Name Completion searches the system address book for the name. When a match is found, it is placed in the To box.

3 Type the name, company, and phone number of the caller.

4 Click the check boxes that apply to this phone message.

5 Type the message in the Message box.

6 Click Send.

**Tips**

- You can place a New Phone Message button on the toolbar. See *Customizing Your Toolbar* under *Customizing GroupWise*.

## Sending Tasks

A task is an item to be completed by a specified date and time which you can assign to yourself, another GroupWise user, or a group of users.

For example, if you have assigned someone to write a report that is due next week, you can assign the report to that user as a task. The user can accept or decline the task, but until it is declined or completed, the task appears on the user's Tasks list each day.

Once it is accepted, a task appears on the Calendar on its start date. When the due date is past, the task displays in red on the Calendar. When you mark a task Completed, it no longer carries over to the next day on your Calendar.

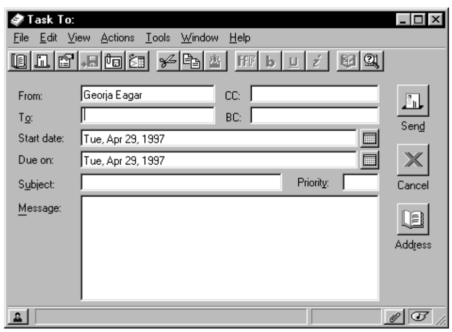
Once you finish a task, you can mark it Completed. As the originator of an assigned task, you can have GroupWise send you notification when the task is marked Completed (you must have Notify installed to receive notification). A Completed status, including the date and time the task was marked Completed, is placed in the Properties window.

#### Assigning a Task to Another User

When you assign a task to another user, a copy of the task appears in your Mailbox. You can assign an optional priority level to a task. There are two levels of priority: alphabetical and numeric. For example, tasks may have priorities such as A, A1, A2, B, B1, 1, 2, and so forth.

In addition to the priority level, you can assign a send priority (high, standard, or low) on the Task tab in Send Options. The send priority determines how the task displays in the recipient's Mailbox. For example, if you assign a task a send priority of high, the task icon is red in the recipient's Mailbox.

**1** Click  on the toolbar.




**2** Type the name of the person you want to assign the task to.

**3** Type the date you want the task to begin.

**4** Type the date you want the task to be completed.

**5** Type the subject.

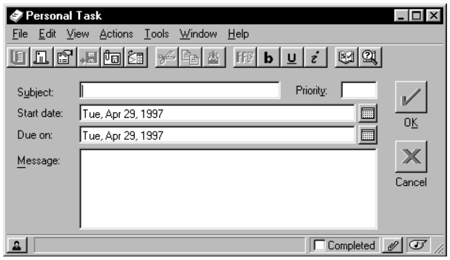
**6** Type a priority for the task.

**7** Type a description of the task.

**8** Click Send.

### Assigning a Task to Yourself

**1** Click the arrow to the right of  on the toolbar ▸ click Personal Task.




**2** Type a subject.

**3** Type a priority for the task.

**4** Type a starting date.

**5** Type a due date.

**6** Type a message.

**7** Click OK.

**Tips**

- You can also specify starting dates and due dates using the Set Date buttons to the right of the Start Date and Due On text boxes.
- Personal tasks are placed in your Calendar. They are not placed in your Mailbox, or in any other user's Mailbox.

### Marking Tasks Completed

When you finish a task, you can mark it Completed. Tasks you mark Completed are not carried over to the next day on your Calendar. Completed tasks are distinguished by a check mark in your Calendar. Overdue tasks display in red.

If you mark a task Completed, then realize you left some part of it incomplete, you can unmark it. Unmarked tasks display on the current day in your Calendar.

When you mark a task Completed, GroupWise sends notification to the originator of the task if he or she selected return notification in Send Options. A Completed status, including the date and time the task was marked Completed, is placed in the originator's Properties window.

#### Checking the Completion Status of a Task ◆

1 Click  on the toolbar.

2 Click the task you want to check the status of.

3 Click File ▸ Properties.

#### Unmarking a Completed Task ◆

1 Click Window ▸ Calendar View.

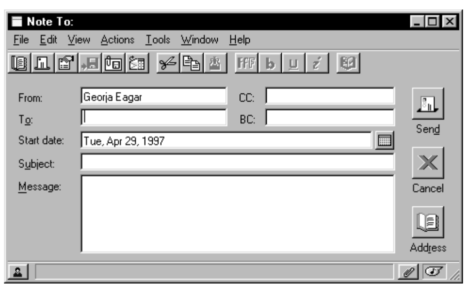
2 Click the marked check box next to the task.

## Sending Notes

A note is a reminder that you post on a specific date on your own or another person's Calendar. You can use notes to remind yourself or others of deadlines, holidays, days off, and so forth. Personal notes are useful as reminders for birthdays, vacations, paydays, and so forth.

### Writing a Personal Note

1 Click File ▸ New ▸ Note.



2 To switch to a personal view, click Edit ▸ Change To ▸ More ▸ click the Personal radio button ▸ click OK.

3 In the Start Date box, type the date you want this note to appear on your Calendar.

4 Type in a subject (optional) and the note.

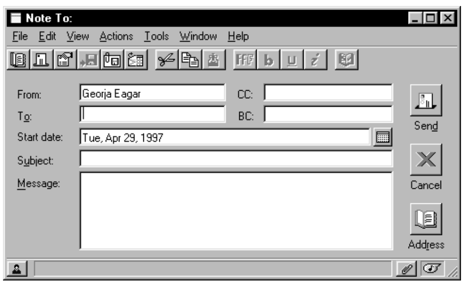
5 Click OK.

**Tips**

- To access the information later, open your Calendar and select the date the information appears on. Double-click the note in the Notes list.
- You can make the Personal Note view your default Note view instead of the Group Note view. See *Setting Options for GroupWise* under *Customizing GroupWise*.

#### Sending a Note to Other Users

1 Click File ▸ New ▸ Note.




2 Fill in the address boxes. If you don't know a username, click Address.

3 In the Start Date box, type the date this note should appear in the recipients' Calendars.

4 Type a subject (optional) and the note message.

5 Click Send.

## Spell-Checking Items You Send

Use Spell Check to check the text for misspelled words, duplicate words, and certain capitalization errors. You can spell-check selected word(s) or the entire message. While spell-checking, you can choose from the following options:

**Replace**
Replaces a misspelled word with a word Spell Check suggests. To replace a misspelled word, double-click the word or click the word ▸ Replace. To make your own corrections, edit the word in the Replace With box ▸ click Replace.

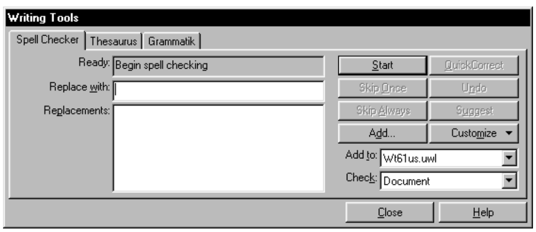
**Skip Once**
Skips the word one time. Spell Check will stop the next time it encounters the word.

**Skip Always**
Skips every occurrence of the word throughout the document. Spell Check ignores the word until the next time you spell-check.

**Add**
Adds the word to the current user dictionary, which stores supplemental words so that Spell Check can recognize the word in future spell-checks.

**1** Click the Subject or Message box.
*or*
Select the text to spell-check.

**2** Click Tools ▸ Spell Check.




**3** Click Yes when spell-checking is complete.

# Attaching Files

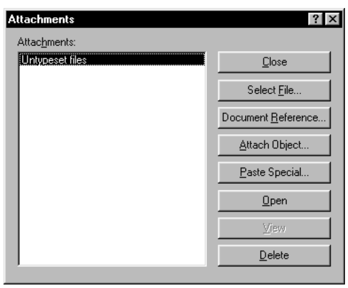
You can attach files and document references to mail messages, appointments, notes, tasks, and phone messages. You can use Attach to send one or more files or document references to other users. For example, you may want to send an expense report to another user. You can attach a file that exists on your hard disk, diskette, or network drive. The recipients can open the attached file, save it, view it, or print it. If you change the attached file after you have sent it, the recipients will not see the changes.

If the file you want to attach is a document stored in a GroupWise Library, you can attach a document reference. The recipient can use the reference to open the document, view it, edit it, or print it depending on the recipient's rights. For more information about sharing rights, see *Sharing Documents* under *Creating and Working with Documents*.

If you attempt to open or view an attached file that is password-protected, you must type the file's password. If you do not know the password, you cannot open or view the attached file.

## Attaching a File to an Item

1. Click  on the toolbar.
2. Fill in the To, Subject, and Message boxes.
3. Click  to open the Attachments dialog box.




4. Click Select File.
5. Click the file you want to send ▸ Open ▸ Close.

   To attach several files, Ctrl+click other files.
6. Click Send.

**Tips**

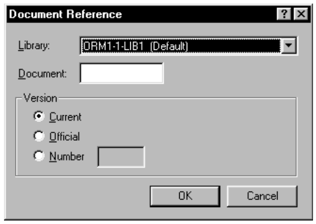
- The recipients will see a small paper clip icon  next to the item in their Mailboxes, indicating that the item has an attachment.
- Moving or deleting a file on a disk or network drive does not affect a file you've attached to an item and sent.

## Attaching a Document Reference to an Item

1 Click on the toolbar.

2 Fill in the To, Subject, and Message boxes.

3 Click ▸ Document Reference.




4 Specify the library where the document is stored.

5 In the Document text box, type the document number.

6 Specify which version (current, official, or specific) you want the document reference to point to ▸ click OK.

7 Click Send.

## Deleting an Attached File from an Item

1 Right-click the attachment you want to delete ▸ click Delete.

**Tips**

- If you cannot see an icon representing the attachment in your view, click ▸ click the attachment you want to delete ▸ Delete ▸ Close.
- If you delete an attached file, it is not erased from disk or network drive; it is simply removed from the attachment list.
- You can delete an attached file if you are the sender, but not if you are the recipient.

## Viewing Attached Files

If you just want to quickly scan an attachment, you can view it instead of opening it. When you view an attachment, it is not opened in a separate application. Instead, it is displayed in a viewer. This is usually faster than opening the attachment; however, the attachment may not be formatted properly.

1 Right-click the attachment ▸ click View Attachment.

> **Tips**
> - If you cannot see an icon representing the attachment in your view, click File ▸ Attachments ▸ View Attachment.
> - If the item you're reading contains several attachments, they appear as icons at the top of the View Attachment window. You can view the other attachments by clicking them.

## Opening Attached Files

When you open an attached file, GroupWise determines the correct application to open the file in. You can accept the suggested application, or you can type the path and filename to another application. If you just want to scan the contents of the attachment, you can view it rather than open it. See *Viewing Attached Files* earlier in this section.

1 Open the item containing the attachment.

2 Right-click the attachment ▸ click Open.

3 If you want to open the attachment in a different application, type the path and executable filename.

   This step may not be necessary if the correct application is already listed.

4 Click OK.

> **Tips**
> - If you cannot see an icon representing the attachment in your view, click File ▸ Attachments ▸ Open.

## Attaching Sound Files to an Item

You can add voice or digitally recorded sound files to an item. For example, you might dictate a letter and have the recipient listen to the dictation and type the letter. However, to annotate an item with sound, you must have the appropriate hardware and software drivers installed.

1 In an item view, drag  from the status bar onto any area of the view outside of the text boxes.

2 Click the circle to begin recording the sound.

3 Click the square to stop the recording.

4 Click File ▸ Exit & Return to GroupWise to close the Sound Recorder dialog box.

# Managing Sent Items

You can display items in your Mailbox that you have previously sent. A few reasons you may want to display items you've sent are listed below:

**Read**
You can read a message you sent to make sure you included correct information or to remind yourself of what you wrote.

**Resend**
You can resend an item a second time, perhaps with corrections or to other users who didn't originally receive the item.

**Track the Status (Properties)**
You can see who received the item, who opened it, who deleted it, and more.

**Retract**
If you realize you made a mistake, and you already sent the item, you may be able to retract it before the recipients read it.

## Displaying Items You've Sent

1 If your toolbar is not already displayed, click View ▸ Toolbar.

2 Click .

**Tips**

- To display both received and sent items, Ctrl+click  or , depending on which button is not currently selected.

## Confirming Delivery of Items You've Sent

GroupWise provides several ways for you to confirm that your item was delivered.

**Track an Item You Sent**
You can check the status in the Properties window of any item you've sent. Right-click the item ▸ click Properties. The Properties window shows you when the item was delivered and opened, in addition to other information.

**Receive Notification When the Item is Opened or Deleted**
You can receive notification when the recipient opens or deletes a message, declines an appointment, or completes a task. While composing a message, click File ▸ Properties ▸ click the When Opened or When Deleted Return Notification pop-up list ▸ select how you want to receive notification.

**Request a Reply**
You can inform the recipient of an item that you need a reply. GroupWise adds a sentence to the item stating that a reply is requested and changes the icon in the recipient's Mailbox to a double arrow. While composing an item, click File ▸ Properties ▸ select how soon you want the reply in the Reply Requested box.

## Resending Items

Use Resend to send an item a second time, perhaps with corrections. Resend lets you send an item without re-typing all the information.

When you resend an item, you can retract the original item. Mail and phone messages cannot be retracted if they've already been opened. Appointments, notes, and tasks can be retracted at any time.

1. Click  on the toolbar to display items you've sent.
2. Right-click the item you wish to resend ▸ click Resend.
3. Make any changes to the item, if necessary ▸ click Send.
4. Click Yes to retract the original item.
   *or*
   Click No to leave the original item.

**Tips**

- You can check the Properties of the original item to see if GroupWise was able to retract it. If Properties does not list Retracted, the item has already been opened.

## Retracting Items You've Sent

Use Delete to retract an item you sent. For example, if you realize you made a mistake after you sent an item, you may want to delete it before the recipients read the item.

1. Click the item in your Mailbox that you want to retract.
   To display sent items in your Mailbox, click  on the toolbar.
2. Click Edit ▸ Delete.
3. Select the appropriate option.
4. Click OK.

**Tips**

- You can retract a mail or phone message from those recipients who haven't yet opened the item. You can retract an appointment, note, or task at any time.
- To see which recipients have opened your message, right-click the item in the Mailbox ▸ click Properties.

## Checking the Status of Your Items

Properties lets you check the status of any item you've sent. For example, you can see when an item was delivered and when the recipient opened or deleted the item. If a recipient accepted or declined an appointment and included a comment, you'll see the comment in the Properties window. You'll also see if a recipient marked a task Completed.

Properties also shows information about items you receive. You can see who else received the item (except for blind copy recipients), the size and creation date of attached files, and more. For information about a document, use the Activity Log in Properties. See *Viewing the History of a Document* under *Creating and Working with Documents*.

**1** Click or open the item for which you want to check the status.

**2** Click File ▸ Properties.

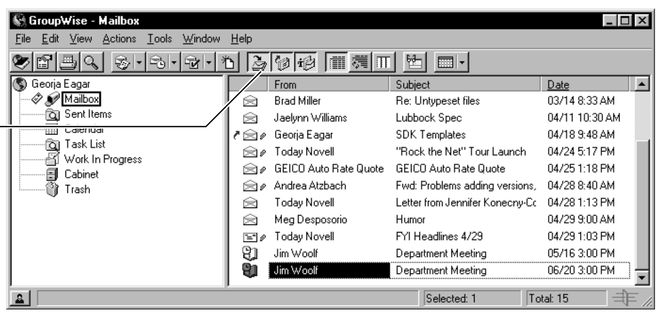
**Tips**

- You can also right-click an item in your Mailbox, then click Properties to see the status information.
- The icons next to an item can give you helpful status information too. See *A Brief Tour of GroupWise* under *Getting Started*.

# Managing Received Items

GroupWise stores all the items, mail messages, appointments, and so on, you receive in your Mailbox.

*Click to display items you've received.*



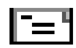

From your Mailbox, you can read items, reply to items, and forward items you've received. In addition, you can delegate tasks and appointments to other users. You can even change an item, such as a mail message, to another type of item, such as an appointment.

## Reading Items You Receive

You can read incoming items in your Mailbox or Calendar. Your Mailbox displays a list of all of the items you have received from other users. Personal appointments, notes, and tasks appear in your Calendar, not in your Mailbox.

You can open and read all types of new items in your Mailbox. However, you may want to read appointments, tasks, and notes in your Calendar so you can view new messages while looking at your schedule. Phone and mail messages stay in your Mailbox until you delete them. Appointments, notes, and tasks stay in your Mailbox until you accept, decline, or delete them. When you accept an appointment, note, or task, it is moved to your Calendar.

All Mailbox items are marked with an icon. The following table includes each icon that displays in your Mailbox. The icons change depending on whether or not the item has been opened.

| Item Type | Unopened | Opened |
|---|---|---|
| Mail Message |  |  |
| Phone Message |  |  |
| Task |  |  |
| Appointment |  |  |
| Note |  |  |

### Reading Items in Your Mailbox

**1** Double-click the item you want to read.

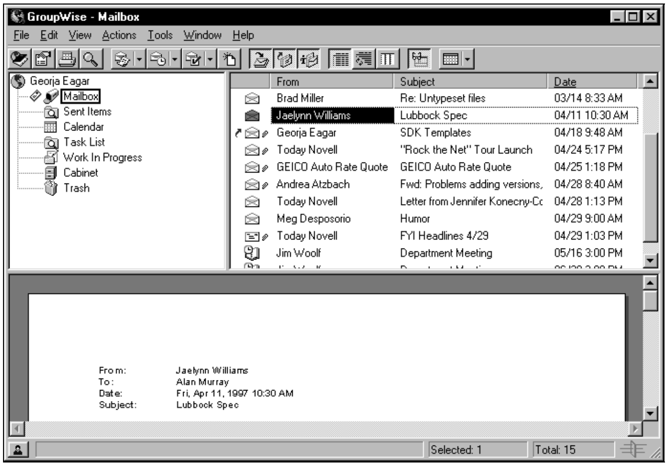
> **Tips**
> - If your Mailbox is not displayed, click  in your Folder List.

### Reading Items in the QuickViewer

Use QuickViewer to scan the contents of your items. QuickViewer saves time because you don't need to open each item; you simply click an item or press Down-arrow to read your items. If you click a document reference, the document will display in QuickViewer. Attachments, however, do not display in QuickViewer.

When you read an item in QuickViewer, the icon changes to the opened status. For example, the closed envelope representing a mail message changes to an opened envelope.

**1** Click  on the toolbar.




**2** Size the QuickViewer by dragging a corner of the window or by dragging the horizontal dividing line up or down.

**3** In the Mailbox, click each item that you want to read.

> **Tips**
>
> - To close the QuickViewer, repeat Step 1 above.
> - Right-click in the QuickViewer window to choose other options such as Print.

### Marking an Item Unread

If you open an item to read it, but decide you want to read the item later, you can mark the item unread. Marking the item unread changes the item's icon to unopened so you will know you still need to read the item.

**1** In the Main Window, click the item in the Item List.

**2** Click Actions ▸ Read Later.

> **Tips**
>
> - Marking an item you have opened unread does not change the status of the item in Properties. For example, if you have opened an item, then marked the item unread, the sender of the item still sees the item status as opened in the Properties window.

## Replying to Items You Receive

Use Reply to respond to an item. You can reply to everyone who received the original item or to the sender only, without having to create and address a new message. You can also include a copy of the original message in your reply. Your reply will include Re: preceding the original subject text. You can modify the subject text if you want.

### Replying to an Item

1. Open or click the item you want to reply to.
2. Click Actions ▸ Reply.


3. Click Reply to Sender.
   *or*
   Click Reply to All (Sender and Recipients).
4. Click OK.
5. Type your message ▸ click Send.

> **Tips**
> - If you reply to all recipients of an item and the original message included BC or CC recipients, your reply will include the CC recipients, but not the BC recipients.

### Including the Message Text in a Reply

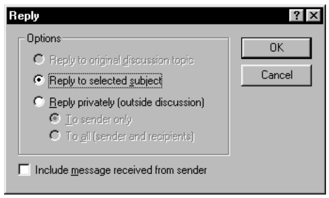
1. Open the item you want to reply to.
2. Click Reply.
3. Click Include Message Received from Sender ▸ OK.
4. Type your message ▸ click Send.

> **Tips**
> - Sometimes you may like to mix your comments with the included text to maintain a conversational flow. In this case, you may want to bold, underline, or italicize your text to differentiate it from the original text.

### Replying to an Item in a Shared Folder

When you reply to an item in a shared folder, you have two additional reply options. If you are reading someone else's reply, you can choose to reply to the original discussion topic, rather than to the item you are reading. Or, you can reply to any item you are reading, whether it's an original discussion topic or someone else's reply. In either case, these replies are posted in the shared folder rather than sent to individuals.

1. Open or select an item in the shared folder.
2. Click Actions ▸ Reply.




3. Click a reply option ▸ OK.

   For a description of each reply option, click  ▸ the option.
4. Type your reply ▸ OK.

**Tips**

- Unless you choose a Reply Privately option, your reply is posted in the shared folder rather than sent to individuals.

## Forwarding Items to Other Users

When you receive a message, appointment, or task, you can forward it to one or more users. You can also forward a document reference. For example, if you are no longer the chairperson of a committee but you are still receiving mail messages related to the committee's business, you can forward the items you receive to the new chairperson.

When you forward an item, it is sent as an attachment to a mail message. The mail message includes your name and any additional comments you have made.

If you receive an appointment, note, or task that you want to assign to another user, use Delegate. When you delegate an item, the sender of the item receives notification that responsibility for the item has been assigned to another user.

1. Click the item you want to forward in your Mailbox.
2. Click Actions ▸ Forward.
3. Click Address ▸ click the tab of the address book you want to use.
4. Double-click the user or group to whom you want to forward the item ▸ click OK.

5 Type a message in the **Message** box (optional).

6 Click **Send**.

> **Tips**
>
> - If you can't accept an appointment, task, or note, you can delegate the item instead of forwarding it. Delegating places a delegated status in the sender's Properties window, letting the sender know you have transferred responsibility for the item to another person.

## Changing Item Types

You can use Change To to convert an item in your Mailbox to another type of item. For example you can change a mail message in your Mailbox to an appointment in your Calendar. The new appointment contains all the information from the mail message (such as To, CC, and BC lists, subject, and message text) that is applicable in the appointment. By default, all new items created using Change To are personal items; however, you can change a personal item to a group item in the Change To dialog box.

When you change a mail or phone message to another type of item (such as an appointment or task), the original item is removed from your Mailbox and the new item is added in the appropriate location, such as the Calendar.

When you change an item, GroupWise displays the default item view selected in Environment Options.

### Changing an Item in Your Mailbox to Another Type of Item

1 In your Mailbox, click the item you want to change.

2 Click Edit ▸ Change To.


3 Click an item type.

4 Type the necessary information.

5 Click Send.

**Tips**

- You can click Edit ▸ Change To ▸ More to change the selected item from a personal item to a group item or vice versa.

### Changing an Item in Your Calendar to Another Type of Item

1. Click Window ▸ Calendar View to open your Calendar.
2. Click the item you want to change in the Appointments, Tasks, or Notes List.
3. Drag the item to the list that corresponds to the type of item you want to change it to.

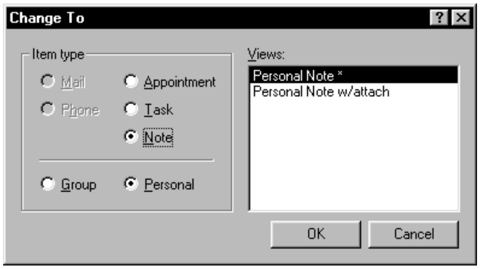
   For example, drag a task to the Appointments List to change it to an appointment.
4. Specify any additional information in the item view ▸ click OK.

**Tips**

- You can also press Ctrl while you drag the item to copy it.

### Changing a Personal Item to a Group Item

1. In your Calendar, click a personal item.
2. Click Edit ▸ Change To ▸ More.




3. Click Group ▸ OK.
4. Type any additional information ▸ click Send.

## Delegating Items

Use Delegate if you receive appointments, tasks, and so forth that you can't accept. For example, you may receive an appointment for a meeting about something you no longer have responsibility for. Instead of declining the appointment, you can delegate it. You can delegate appointments, tasks, or notes. The sender can find out who you delegated the item to in the item's Properties window.

1 In the Main Window, click a task, note, or appointment.

2 Click Actions ▸ Delegate.

3 Type usernames in the address boxes. If you are unsure of the spelling, click Address.

4 Type any additional comments to the recipient.

5 Click Send.

6 Click Yes if you want this item to remain in your Calendar.
*or*
Click No if you want this item deleted from your Calendar.

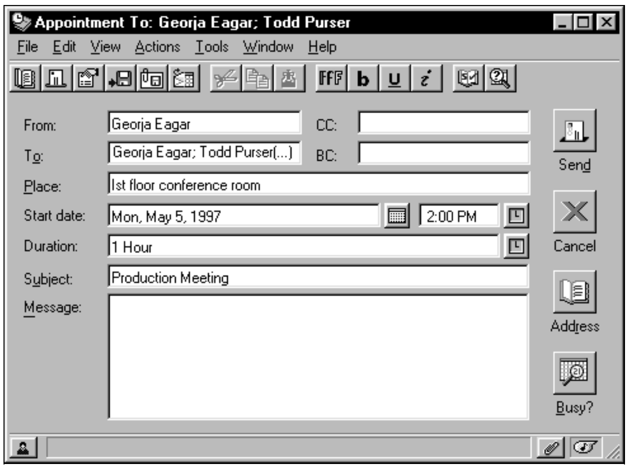
# Scheduling Group and Personal Appointments

# Scheduling Appointments

Scheduling appointments, tasks, and notes with GroupWise® is convenient. You can use Busy Search to check for a time when all the people and resources you want for a meeting are available. You can use Auto-Date to schedule recurring appointments, tasks, or notes quickly and easily. See *Scheduling Recurring Appointments* under *Scheduling Group and Personal Appointments* for Auto-Date information. You can also reserve a block of time with a personal appointment. If you want to find out whether someone accepted a task or is coming to your meeting, you can check for an accepted or declined status.

## Scheduling an Appointment

**1** Click  on the toolbar.




**2** In the To, CC, and BC boxes, type the names of the people to invite. In addition, include any resource IDs in the To box. If you do not know a resource ID, click Address.

**3** Type the place description in the Place box.

**4** Specify the start date, start time, and duration.

**5** Type a subject and message.

6 Click Send.

**Tips**

- If you select a location resource in the Address Book, its description is displayed in the Place box and its ID in the To box.
- If you want to make sure the people and resources for the meeting are available, you can do a Busy Search. See *Checking When Everyone Is Available* later in this section.
- If you are later working toward a deadline, are on vacation, or are otherwise not available for meetings, schedule a personal appointment for those times. When another user includes you in an appointment and does a Busy Search, the user can see you are not available at those times.
- To display a different appointment view (for example, a Personal Appointment view) whenever you click , use Default Views Options.

## Rescheduling an Appointment

1 On the toolbar, click if your Mailbox is not displaying outgoing items.

2 Click the appointment to reschedule.

3 Click Actions ▸ Resend.

4 Make your changes ▸ click Send.

5 Click Yes to retract the original item.

**Tips**

- You can reschedule an appointment if you scheduled the original appointment or if you have the necessary proxy rights to the scheduler's Mailbox.
- To reschedule an appointment for a new time on the same day, open your Calendar and drag the appointment to the new time.

## Canceling an Appointment

1 On the toolbar, click if your Mailbox is not displaying outgoing items.

2 Click the appointment you want to cancel.

3 Click Edit ▸ Delete.

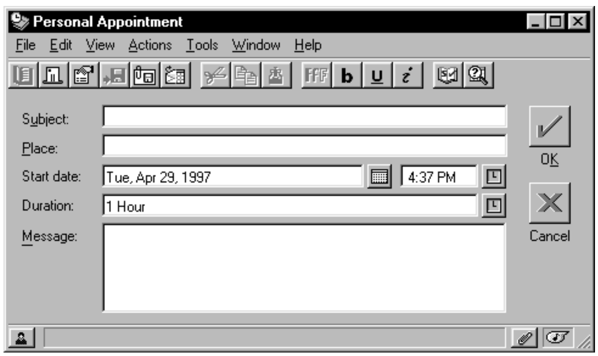
4 Click All Mailboxes ▸ OK.

**Tips**

- You can cancel an appointment if you scheduled it or if you have the necessary proxy rights to the scheduler's Mailbox.
- For help on a dialog box option, click ? ▸ the option.

## Scheduling a Personal Appointment

1 On the toolbar, click the arrow to the right of ▸ click Personal Appointment.




2 Type a subject, a place (optional), and a message (optional).

3 Specify the start date, start time, and duration.

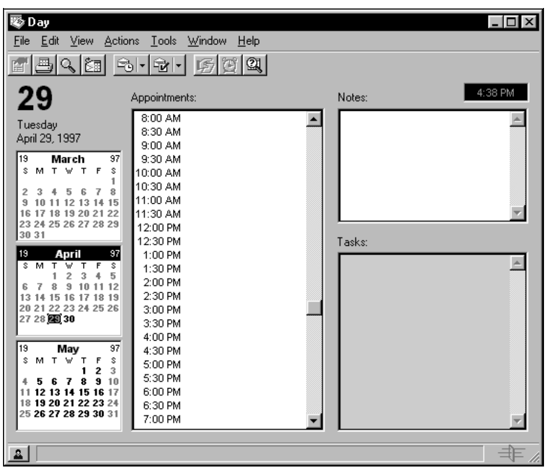
**4** Click OK.

**Tips**

- If you are working toward a deadline, are on vacation, or are otherwise not available for meetings, schedule a personal appointment for those times. When another user includes you in an appointment and does a Busy Search, the user can see you are not available at those times.
- A personal appointment view has no To, CC, or BC boxes. The personal appointment is automatically placed in your Calendar.
- Duration can be in minutes, hours, or days. If you are going on a two-week vacation, you can schedule one personal appointment with a duration of 14 days to cover the entire period.
- For both group and personal appointments, being scheduled for a certain period does not prevent you from being scheduled for another appointment at the same time; it simply creates a scheduling conflict. Users who do a busy search will want to avoid double-booking you, but they can if they choose to.

## Scheduling a Personal Appointment from the Calendar

**1** Click Window ▸ Calendar View.




**2** Click the date you want ▸ double-click the time in the Appointments box.

**3** Type a subject, a place (optional), and a message (optional).

4 Specify the duration ▸ click OK.

**Tips**

- A personal appointment view has no To, CC, or BC boxes. The appointment is automatically placed in your Calendar. If you have changed your Date and Time options so that your appointment list box is not displayed in outline mode, you will need to add the time to the appointment once the appointment view is opened.
- To display the personal appointment view when you schedule appointments from the File menu, use Environment Options.

## Checking When Everyone Is Available

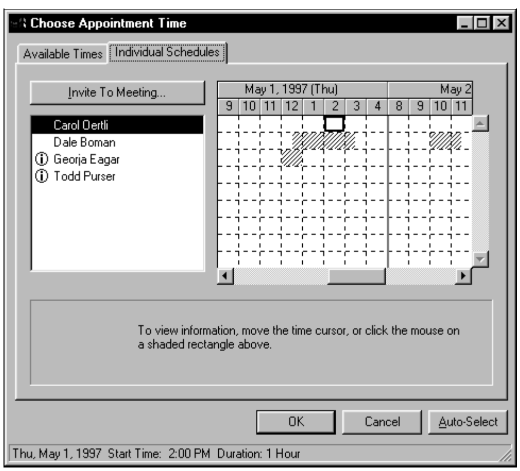
Use Busy Search to find a time when all the people and resources you want to schedule for a meeting are available. You can also use Busy Search in GroupWise Remote.

1 In an appointment you are creating, specify usernames and resource IDs in the To box. If you don't know the resource IDs, click Address.

2 Specify the first possible day for the meeting in the Start Date box.

3 Specify the meeting's duration.

4 Click Busy.




An empty space across from the username or resource on the Individual Schedules tab indicates that user or resource is available for that time. An empty space across from a time on the Available Times tab indicates that no users are scheduled for that time.

5 Click Auto-Select to select the first available meeting time or click Auto-Select until the time you want is displayed ▸ click OK to transfer the users, resources, and selected time and duration back to the appointment you were scheduling.

*or*

Click the Available Times tab to see possible meeting times ▸ click a time to select it ▸ click OK to transfer the users, resources, and selected time and duration back to the appointment you were scheduling.

6 Complete and send the appointment.

**Tips**

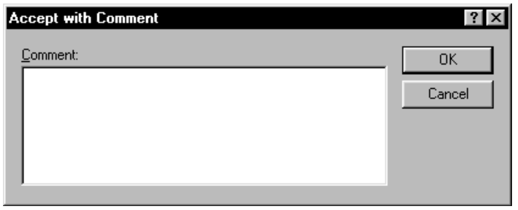
- You can click a scheduled time across from the username or resource on the Individual Schedules tab to display more information about the appointment in the box below. However, the user or resource owner must give you appointment Read rights in the Access List before you can do this.
- To remove a user or resource from the Invite to Meeting list after the search, click the Available Times tab ▸ click the username or resource to remove ▸ press Delete. This is useful if you include several conference rooms in the search to find one that is available and then eliminate those you do not want.
- To exclude a username or resource from the search without removing it from the To box, click the Available Times tab ▸ click the check box next to the user or resource to exclude. Excluding a person or resource from the search is useful if a user (like a CC recipient) should be invited to a meeting but does not necessarily need to attend. To include a user or resource name that has been excluded, click the check box next to the user or resource. If you click a scheduled time on the Available Times tab, a cross-hatched box is displayed next to the user(s) in the Invite to Meeting list who are already scheduled for that time.
- If you want to do a Busy Search before opening an appointment, click Tools ▸ Busy Search. You will specify information in a dialog box instead of an appointment view, then click OK to do a Busy Search. When you find a time you want for a meeting, click the Invite to Meeting button to transfer the information to a new appointment view, then complete the appointment as you normally would.
- For help on a dialog box option, click ? ▸ the option.

## Accepting or Declining Scheduled Items

When you receive an appointment, task, or note, you may or may not be able to accept. In GroupWise, you can let the sender know if you accept or decline, and add additional comments. You can also delegate the item to another user. The sender can find your response by checking the item status.

1 Double-click the item in the Mailbox to open it.

2 Click Accept or Decline.




3 Type a comment (optional) ▸ click OK.

4 If the item is an Auto-Date item, you are prompted after you accept or decline. Click This Instance to accept or decline this one Auto-Date item. Click All Instances to accept or decline all instances of the Auto-Date item.

**Tips**

- As the owner of a resource, you can accept or decline requests for the resource. The owner of a resource can also use Rules to automatically reply to resource requests. See *Creating Rules* under *Managing Your Mailbox*.

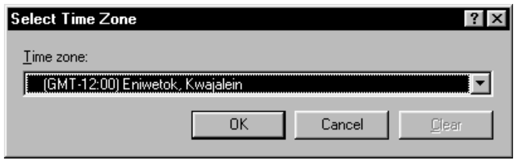
## Specifying a Time Zone for an Appointment

The Time Zone feature lets you schedule a meeting for recipients in different time zones who will be meeting in a single location.

Normally, GroupWise automatically adjusts meeting times based on the recipients' time zones. For example, a meeting scheduled by a user in Utah for 10:00 would be displayed as 9:00 for a recipient in California and as 12:00 for a user in New York because these users are in different time zones. Because GroupWise adjusts the time, all the users scheduled for a conference call would call in at the same moment, even though their local time may differ.

Use the Time Zone feature if you don't want GroupWise to adjust to the recipients' local time zone. For example, if you are in the Saskatchewan time zone and include users from the Mountain Time (US & Canada) time zone in your appointment, you would use the Time Zone feature if these users are flying to Saskatchewan for the appointment. Time Zone ensures that the appointment in their Calendars and Mailboxes shows the correct Saskatchewan time.

1. Click  on the toolbar.
2. Fill in the To, CC, and BC boxes with the names of users or resources to be included in the appointment.
3. Specify the place, subject, and message in the appropriate text boxes.
4. Click Actions ▸ Select Timezone ▸ click the Time Zone drop-down list and select the time zone for the appointment location ▸ click OK.




5. Specify the start date, start time, and duration of the appointment.
6. Click Send.

**Tips**

- When the users you have scheduled with the Time Zone feature receive the appointment, they will see a time annotation after the subject when they see the appointment in their Mailboxes. For example, if the subject of the meeting is “Marketing Conference” and the time zone is Saskatchewan, users would see a subject and time annotation similar to the following: Marketing Conference (Saskatchewan). In the users’ Calendars, the place is annotated with the time zone, rather than the subject.

# Scheduling Recurring Appointments

Use Auto-Date to schedule recurring appointments, tasks, and notes. For example, if you were responsible for scheduling a department meeting every other week, you could create one auto-date appointment that would schedule the meeting for the entire year. You could also reserve a room and projector with the same appointment.

Auto-Dates can occur on the same day every week (for example, every Monday), the same day(s) of the month (for example, the 15th and last day), or any other defined series of dates. You can also use Auto-Date to schedule irregular or infrequent events, such as holidays.

When you send an auto-date item, GroupWise copies the item and places one of the defined dates in each copy of the item. For example, if you define five dates for the event, GroupWise makes five copies of the item and schedules one copy for each date. If you were to send the item to other users, you would have five outgoing items with a five-occurrence auto-date. If you were to receive the event, you would find five copies of the incoming item in your Mailbox, each scheduled for a different date.

You can create an auto-date three ways. Example lets you schedule events on the same day every week, the same day each month, or periodically. Dates lets you select specific days from a year calendar. Formula lets you enter the scheduling information in text format.

## Scheduling Auto-Dates by Example

1. In an appointment, task, or note you are scheduling, click Actions ▸ Auto-Date.
2. Click the Example tab.
3. In the Range group box, specify the starting date and ending date.

   *or*

   To specify a certain number of occurrences rather than a range, specify the starting date ▸ click the End pop-up menu ▸ Occurrences ▸ specify the number of occurrences.
4. Click the Days of the Week drop-down list ▸ click an option.
5. Click the months to schedule. To schedule all of the months, double-click any month.
6. If you clicked Days of the Month, click the On drop-down list ▸ an option ▸ click the numbered days to schedule (for example, 1 and 15).

   *or*

   If you clicked Days of the Week, click the ordinal number across from the day of the week to schedule (for example, 2nd Tue).

   *or*

   If you clicked Periodic, specify a period length (for example, every 15 days).

7 Click OK.

**Tips**

- Use Example or Formula to schedule events that occur on the same day of the week (for example, every Monday), the same day(s) of the month (for example, the 15th and last day), or in a defined period of time (for example, every 14 days).
- If you have been using Formula or Dates and decide to change to Example, click the Example tab.
- To clear the Auto-Date dialog box, click Reset.

## Scheduling Auto-Dates by Dates

1. In an item you are scheduling, click Actions ▸ Auto-Date.
2. Click the Dates tab.
3. Click the days to schedule ▸ click OK.

**Tips**

- Use the Dates tab to schedule an item on specific dates on a year calendar. Dates is useful when you are scheduling events that don't occur regularly, like holidays.
- To quickly move to a different year, click the year button ▸ type the new year ▸ click OK.

## Scheduling Auto-Dates by Formula

1. In an appointment, task, or note you are scheduling, click Actions ▸ Auto-Date.
2. Click the Formula tab.
3. In the Range group box, specify the starting date and ending date.

   *or*

   To specify a certain number of occurrences rather than a range, specify the starting date ▸ click the End pop-up menu ▸ Occurrences ▸ specify the number of occurrences.

4 Type the formula text ▸ click OK.

**Tips**

- For information on how to enter formula text, see *Using Auto-Date Formula Functions and Operators* later in this section.
- For additional examples later, create an auto-date using Example ▸ click the Formula tab.
- Formula uses the same syntax as WordPerfect® Office® 3.1.

## Scheduling Offset Days of the Week

Use Offset Days to schedule an appointment, note, or task a specified number of days prior to or after a specified day of the week.

1. In an appointment, task, or note you are scheduling, click Actions ▸ Auto-Date.
2. Click the Example tab.
3. In the Range group box, specify the starting date and ending date.
4. Click the months you want to include. To include all months, double-click any month in the Months group box.
5. Click a day of the week (for example, Wed).
6. Specify the number of days to offset ▸ click OK twice.

**Tips**

- As an example, you might need to schedule a meeting on the Monday following the first Sunday of each month (which may or may not be the first Monday of the month). To do so, open the Auto-Date dialog box ▸ click Days Of the Week ▸ click 1st in the Sunday row ▸ click the Sunday button ▸ type 1 ▸ click OK twice.

## Scheduling Offset Days of the Month

Use Offset Days to schedule an appointment, note, or task a specified number of days prior to or after a specified day of the month.

1. In an appointment, task, or note you are scheduling, click Actions ▸ Auto-Date.
2. Click the Example tab.
3. In the Range group box, specify the starting date and ending date.
4. Click the months you want to include.

   To include all months, double-click any month in the Months group box.
5. Click the Days of the Week pop-up list ▸ Days of the Month.
6. Click the Last button.

7 Specify the number of days to offset ▸ click OK twice.

**Tips**

- Here's an example of how you could use offset days of the month. If you want a reminder to appear in your Notes list the 2nd to the last day of each month, open the Auto-Date dialog box, then click Days of the Month. Double-click any day to select all days (Sun, Mon, Tue, etc.). Click Last ▸ click the Last button. Type -1 ▸ click OK.

## Using Auto-Date Formula Functions and Operators

You can use functions and operators to create an auto-date formula. Keep in mind that you can create the same kind of auto-dates easily and quickly with the Example tab. The Formula tab is provided for continuity and for those people who prefer creating auto-dates with formulas.

### Auto-Date Formula Operators

An operator is a character or word you insert in a formula to perform a specific operation. Each operator is assigned a priority, meaning that when a formula is evaluated, some operations are performed before others.

You can use grouping operators to group operators according to their priorities. The table below lists operators and their priorities. Additional details about the operators are provided following the table.

| Function | Priority |
|---|---|
| A blank space (high-priority And) | 1 |
| Plus or + | 2 |
| Minus or - | 2 |
| To or : | 3 |
| Every. . .Starting | 4 |
| Every. . .Ending | 4 |
| Before | 5 |
| On/Before | 5 |
| After | 5 |
| On/After | 5 |
| Near | 5 |
| Near/After | 5 |
| Or or, | 6 |
| Not or ! | 6 |
| And or & (low-priority And) | 7 |

**Grouping Operators** ◆ Use parentheses as grouping operators to change the priority of operators or to group functions together for clarification.

For example, because the high-priority And operator (a space) has a higher priority than the Or operator (a comma), the formula below means that all scheduled days must fall on a Tuesday or must fall on a Thursday and be in the month of July or must be in the month of August.

tue,thu jul,aug

In other words, the formula is performed as if parentheses were inserted as follows:

(tue,thu) (jul,aug)

Now examine the following formula:

(tue),(thu jul),(aug)

This formula would schedule all Tuesdays, all Thursdays in the month of July, and all days in the months of August. Notice how the meaning changes when parentheses are included as in the formula below.

(tue,thu) (jul,aug)

With the preceding formula, all scheduled days must fall on a Tuesday or Thursday and must be in the month of July or August. The end result is that only Tuesdays and Thursdays in July and August are scheduled.

**High-Priority And** ◆ A space between two functions acts as an And operator, meaning that both functions must hold true. For example, 25 means the 25th day of all months in all years. But 25 oct means that all scheduled days must fall on the 25th day of the month and must be in October. And 25 oct 1997 means that all scheduled days must fall on the 25th day of the month and must be in October and must be in the year 1997.

**Offset Operators** ◆ You can use a positive offset operator (+ or the word plus) or a negative offset operator (- or the word minus) to add a relative offset to a function or statement.

For example, to schedule an event three days before the first Thursday in February for all years, you could enter the following formula:

thu(1) feb-3

**Range** ◆ The range operator (: or to) functions like a series of Or operators (see *Or* in this section) between each item (day, month, etc.) in the range.
For example, if you want to schedule the 15th of every month, but only if the 15th is a weekday, you could enter either of the following formulas:

15&mon:fri

15(mon:fri)

This formula means that all scheduled days must fall on the 15th of the month and must be a day from Monday to Friday. Another way of describing the formula is that all scheduled days must fall on the 15th of the month and must be a Monday or Tuesday or Wednesday or Thursday or Friday.

**Periodic Operators** ◆ The three periodic operators are Every, Starting, and Ending. Use Every in combination with Starting and/or Ending to schedule days at regular intervals, beginning on a specific date and/or ending on a specific date.

For example, suppose you want to schedule a meeting for once a week starting on March 3, 1997 and continuing through June 11, 1997. You could use the following formula:

every 7 starting mar 3 1997 ending jun 11 1997

The formula will schedule every seventh day starting with March 3, 1997 and ending with June 11, 1997. The starting date is always scheduled as the first day and the ending date is scheduled only if it naturally falls at the Every interval. If you do not use both the starting and Ending operators, the starting or ending date is the first or last date in the Calendar file.

For example, examine the following formula:

every 7 starting mar 3 1997

The preceding formula schedules every seventh day starting on March 3, 1997 and continuing to the last date in the Calendar file. The Every command will work with numbers up to 30. For example, every 45 starting mar 3 1997 is not a valid formula.

**Relative Operators** ◆ The six relative operators are Before, On/Before, After, On/After, Near, and On/Near. Use these operators to schedule days relative to a specific date. For example, to schedule the Monday closest to November 6 in all years, you could enter the following formula:

mon on/near nov 6

If you need to schedule the first Tuesday after November 6, 1997, you could enter the following formula:

tue after nov 6 1997

**Or** ◆ You can use the Or operator (, or the word Or) to indicate that one or the other function or statement must hold true in order to schedule days.

For example, to schedule an appointment on the 15th day of each month in the year 1997, but only if the 15th falls on a Tuesday or Thursday, enter the following formula:

15 1990 (tue,thu)

**Not** ◆ When placed before a function, the Not operator (! or the word not) negates that function.

For example, if you want to schedule all days in January, 1997 except for Tuesdays and Thursdays, you could use the following formula:

jan 1997 !tue !thu

**Low-Priority And** ◆ Like a space, the low-priority And operator (& or the word And) between two functions indicates that both functions must hold true. However, the low-priority And has the lowest priority of all operators.

For example, examine the following formula:

tue,thu jul,aug

This means that scheduled days must be a Tuesday or must be a Thursday and must be in July or must be in August. However, suppose you were to substitute the high-priority And (a space) with a low-priority And, as in the following formula:

tue,thu and jul,aug

The preceding formula indicates that scheduled days must be a Tuesday or must be a Thursday and must be in July or must be in August. In the first formula, the And operator is evaluated before the Or operators. In the second formula, the And operator is evaluated after the Or operators.

### Auto-Date Formula Functions

Use the auto-date functions listed below to schedule specific days of a week, month, or year. You must use the exact spelling of the functions. For example, GroupWise reads “tue,” but not “tues.” GroupWise is not case-sensitive.

**Day of the Week** ◆ For example, tue would schedule for all Tuesdays.

**Day of the Month** ◆ For example, the number 3 would schedule for the 3rd day of the month. Also, the word last would schedule for the last day of the month.

**Day of the Year** ◆ For example, 35 would schedule for the thirty-fifth day of the year.

**Month of the Year** ◆ For example, jan would schedule all days in January.

**Year** ◆ For example, 1997 would schedule all days in 1997.

**Weekday of the Month** ◆ For example, tue(1). This would schedule the first Tuesday of the month. Also, sun(last) would schedule the last Sunday of the month, and fri(last-1) would schedule the second to last Friday of the month.

# Using Your Calendar

# Using Your Daily Calendar

Use Calendar to manage your schedule. You can view your appointments, tasks, and notes in a variety of formats, read them from your Calendar, save them, and print them out in a various formats.

You can even print your schedule in Franklin Day Planner® formats to save yourself time and effort in coordinating your GroupWise® schedule with your Franklin Day Planner. See *Printing Items in Your Mailbox* under *Managing Your Mailbox* for information on printing your schedule.

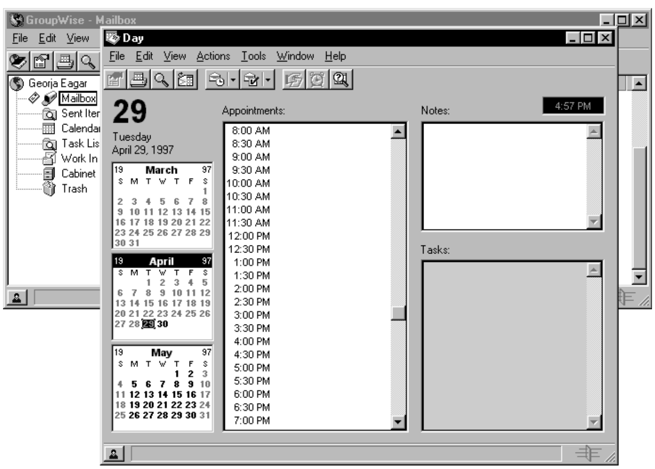
## Viewing Your Calendar

GroupWise provides three organizational Calendar structures with variations for viewing appointments, tasks, and notes. These convenient methods of viewing your scheduled items help you organize and focus on the information that is most important to you.

### Calendar View

You can view all your scheduled GroupWise items in a day, week, year, or other specialized format that you can specify. See *Changing the Calendar View* later in this section. You can also specify a different default Calendar view in Options. See *Setting Options for GroupWise* under *Customizing GroupWise*.

**1** Click Window ▸ Calendar View to open a separate window with a calendar view.

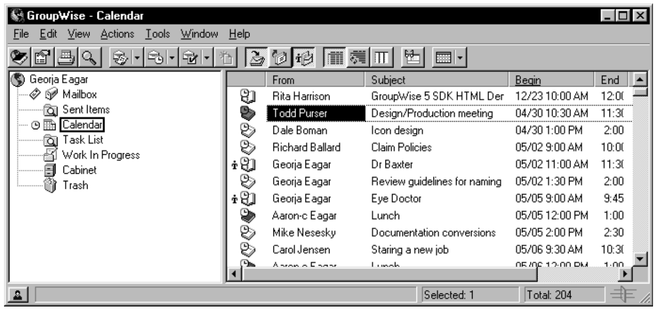



### Calendar Folder

You can find all your GroupWise scheduled items in this location without opening a separate window.

**1** Click Calendar in the Folder List box.

2 Click View ▸ Details if you want to see your scheduled items in a list.




### As Calendar

This method of viewing your Calendar is useful if you store all your appointments or other items for a specific project or client in one folder and want to see your schedule for that project only.

1 Click a project folder in the Folder List.

2 Click View ▸ as Calendar to display all scheduled, accepted items that are saved in that folder.

---

## Reading an Item in Your Calendar

1 Click Window ▸ Calendar View.

2 Double-click the item you want to read.

**Tips**

- You can change the Calendar view to a different format such as day, week, or year. See *Changing the Calendar View* later in this section. You can read an item in all calendar views except the Year view.

---

## Saving an Item in Your Calendar

1 Click Window ▸ Calendar View to open the Calendar.

2 Click the item you want to save ▸ click File ▸ Save As.

3 In the Save File As text box, type a filename for the item.

4 To save the item in a different directory than is shown in the Current Directory text box, click Browse ▸ click a drive ▸ click a folder ▸ OK.

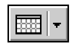
5 If you want GroupWise to prompt you to replace an existing file with the same name, click the Report Filename Conflicts check box.

6 Click Save ▸ Close.

**Tips**

- When you save a Calendar item, GroupWise provides a filename using the subject line with a .MLM extension. You can use this name or type a different filename in the Save File As text box.
- To save items, you can also right-click the item ▸ click Save As to open the Save dialog box.

## Changing the Calendar View

1 Click the arrow on the right of  on the toolbar ▸ click a view.

**Tips**

- Change the Calendar view to see a year calendar, a weekly schedule, a project planner view, and so on.
- You can specify a different default Calendar view in Options. See *Setting Options for GroupWise* under *Customizing GroupWise*.

## Changing the First Day of the Week in Your Calendar

1 Click Tools ▸ Options.

2 Double-click Date & Time ▸ click the Calendar tab.

3 Select a day ▸ click OK.

## Viewing a Different Date in Calendar

1 Click Window ▸ Calendar View to open a calendar view.

2 To view a different date than the date(s) displayed in the calendar view, click the date.

*or*

Click View ▸ Go to Date ▸ specify a date ▸ click OK.

3 If you want to return to today's date, click View ▸ Go to Today.

**Tips**

- Use Go To Date to view the schedule of a day not visible on your Calendar.
- Going to a different date is not applicable to some views. For example, a view that displays a Tasks list only is not connected to one specific date.

# Setting Alarms for Calendar Items

GroupWise can sound an alarm to remind you of an upcoming appointment. You can also choose to open a file or to run a program when the alarm goes off. For example, you can set an appointment to back up your files when you aren't at work and your computer is on.

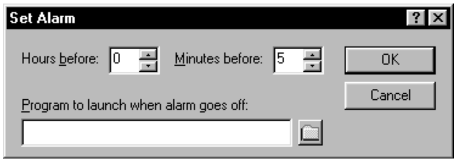
In Options, you can specify a default that automatically sets an alarm each time you accept an appointment.

IMPORTANT: Notify must be open or minimized for the alarm to sound.

## Setting an Alarm

1 In your Mailbox or Calendar, click an appointment.

2 Click Actions ▸ Set Alarm.



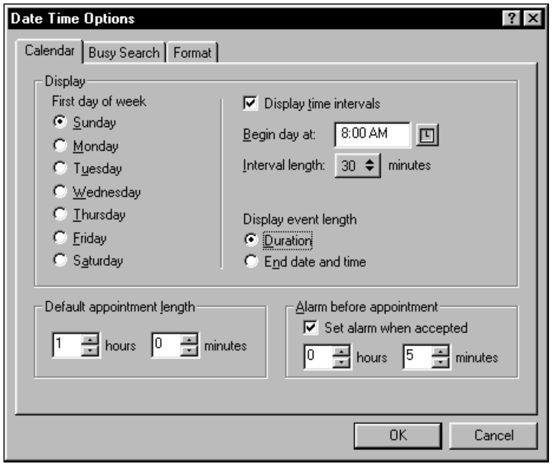

3 Specify the number of hours or minutes before the appointment that you want the alarm to sound ▸ click OK.

**Tips**

- You can also right-click the appointment, then click Set Alarm to set an alarm.
- If Set Alarm is dimmed, make sure that the appointment time hasn't already passed.
- In Options, you can choose to automatically set an alarm each time you accept an appointment.  See *Setting Options for GroupWise* under *Customizing GroupWise*.
- You can specify a path to an application to open that application when the alarm goes off.

### Specifying How Long Before an Event the Alarm Sounds

1. Click Tools ▸ Options.
2. Double-click Date & Time ▸ click the Calendar tab ▸ Set Alarm When Accepted.




3. Specify the hours and minutes before an event that you want an alarm to sound.
4. Click OK.

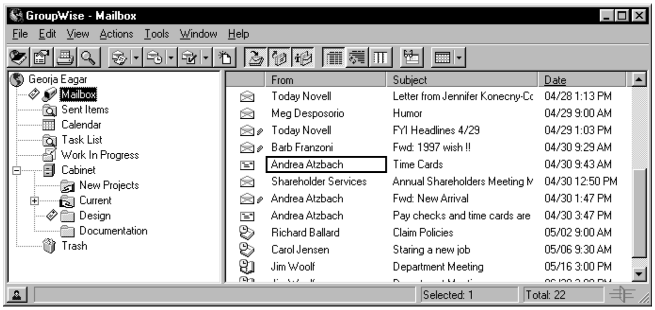
**Tips**

- For help on a dialog box option, click ? ▸ the option.

# Managing Your Mailbox

# Using the Folder List

Use folders to store and organize incoming and outgoing items such as appointments, notes, tasks, document references, and mail or phone messages in your Mailbox. This lets you group all items related to a particular task together. A typical user's Folder List might look like this:




All folders in your Main Window are subfolders of the user folder. The user folder represents your user database, and contains all of your GroupWise® information. Under the user folder there is the Mailbox, a Sent Items folder, the Calendar, a Task List folder, the Work In Progress folder, your Cabinet (which contains all your personal folders), and the Trash. You can organize items in your folders by moving or linking them. When you move an item into a folder, it is taken from one location and placed in another. When you link an item to a folder, the item still exists in its original folder and it also appears in the new folder. When you change a linked item, it is also changed in the other folders.

You can define a different set of properties for each folder in your Folder List. These properties include which columns appear in the Item List, the order and size of the columns, the sort order, and whether items are displayed by details or discussion thread.

You can create as many display settings as you want, and apply them to any folders in your Folder List. For example, you could use one display setting for most of your folders, and have special display settings for a few personal folders.

You can store unfinished items in a pre-defined folder called Work In Progress. See *Saving Items in Your Mailbox* under *Managing Your Mailbox*. You can also make folders public by sharing them. See *Using Shared Folders* under *Managing Your Mailbox*.

## Renaming Folders

1. In the Main Window, right-click the folder you want to rename ▸ click Rename.
2. Type a new name for the folder.

**Tips**

- You cannot rename the Calendar, Mailbox, Work In Progress, or Trash folders.

## Deleting Folders

1. Right-click the folder you want to delete ▸ click Delete.
2. Select Items Only or Folder(s) and Items ▸ OK.

**Tips**

- You cannot delete the Calendar, Mailbox, Work In Progress, or Trash folders.
- To delete a shared folder, right-click the folder ▸ click Delete ▸ Yes.

## Creating Folders

1. In the Folder List, click File ▸ New ▸ Folder.
2. Type a name for the new folder.
3. Click Up, Down, Right, or Left to position the folder where you want it in the Folder List ▸ click Next.
4. Type a description for the folder ▸ click Finish.

**Tips**

- If you create a folder, then decide you want it in a different position, drag the folder to a new position in the Folder List.

## Moving an Item to Another Folder

1. Drag an item from the Item List to the folder you want.

**Tips**

- To remove all links from an item while you move it, press Alt while you drag an item onto a folder. The item is removed from all folders it was previously linked to and is placed in only one folder.
- To link an item to another folder and leave a copy in the original folder, press Ctrl while you drag an item to another folder.

**Putting Items in More Than One Folder**

1 Click an item in the Mailbox.

2 Click Edit ▸ Move/Link to Folders.

3 Click the check box next to each folder you want the item in.

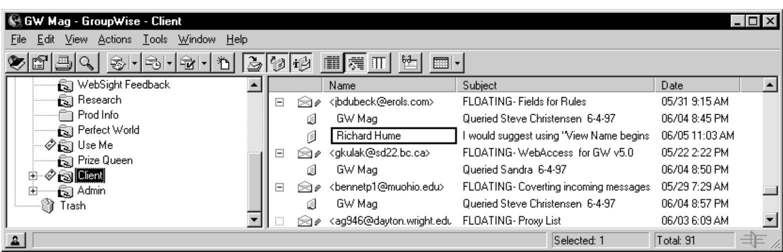
4 Click Link.

**Tips**

- If you delete the original item, the copies in your other folders remain.
- Click Delete Old Links to delete an item from all folders it was previously linked to and to move the item to a new folder.
- In the Main Window, press Alt while you drag an item onto a folder to move the item into the folder. The item is removed from all folders it was previously linked to and is placed in only one folder.
- In the Main Window, press Ctrl while you drag an item onto a folder to link the item to that folder.

# Using Shared Folders

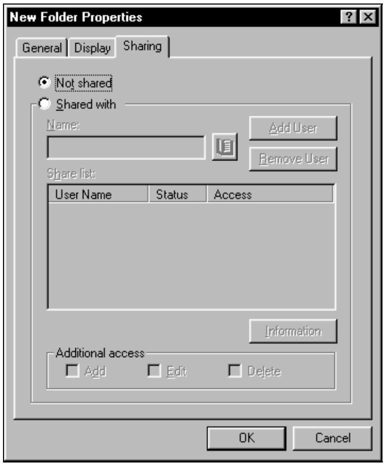
You can make personal folders in your Cabinet public by sharing them. For example, if you want to have a place where everyone in your department can put and view GroupWise items like mail messages, documents, and so forth, you can share a folder. You choose whom to share the folder with, and what rights to grant each user. Then, users can post messages to the shared folder, drag existing items into the folder, and create discussion threads. This is what the contents of a typical shared folder might look like:




If you use GroupWise Remote, changes in shared folders are updated whenever you connect to the master GroupWise system. For example, if you add an item to a shared folder from your Remote Mailbox, people in your office will see that item in the shared folder only after you dial into the master GroupWise system.

## Sharing a Folder with Other GroupWise Users

1 In the Main Window, right-click the folder you want to share ▸ click Sharing.




2 Select Shared With.

3 In the Name box, start typing the name of a user.

4 When the user's name appears in the box, click Add User to move the user into the Share list.

5 Select the access options you want for the user.

6 Repeat Steps 3-5 for each user you want to share the folder with.

7 Click OK.

**Tips**

- If you want the folder to have a specific function, you might create a new display setting. For example, if the folder is for shared discussions, you should create a setting that views items by reply thread and contains both sent and received items. Right-click the folder ▸ click Properties ▸ Display.

### Posting an Item to a Shared Folder

1. Click the shared folder in your Folder List to open it.
2. Click File ▸ New ▸ Discussion.
3. Type a subject for the new item.
4. Type your message.
5. Click OK.

**Tips**

- To reply to an existing item in a shared folder, open the item ▸ click Reply ▸ select a reply option ▸ click OK.
- To post a document reference to a shared folder, you must be the author of the document, or the author of the document must have given you share rights for the document.
- You can attach files to shared topics so that others can access those files easily. See *Attaching Files* under *Working with Items in Your Mailbox*.

## Running Notify

Notify alerts you when you have incoming items, when your outgoing items are opened, or when you have an upcoming appointment. Notify can alert you in four ways: a sound, a dialog box, a small icon, or by launching an application.

You can receive alarms and notifications for another user if that user gives you those rights in the Access List. See *Giving Other People Access to Your Mailbox* under *Managing Your Mailbox*.

Notify is installed in the same folder as GroupWise when you run GroupWise Setup. Notify runs minimized in the background while you run other programs. When Notify is running, the globe icon appears on your Windows® taskbar.

### Starting Notify

1. Click Start on the Windows taskbar ▸ Programs ▸ GroupWise 5 ▸ GroupWise Notify.

**Tips**

- To make access easier, create a shortcut to Notify on your Windows desktop.

## Reading an Item from Notify

1. When the Notify dialog box appears, click Read.


**Tips**

- If a Notify dialog box does not display when you receive notification, right-click on the Windows taskbar ▸ click Read Mail.
- If you want a Notify dialog box to display when you receive notification, right-click on the Windows taskbar (Notify must be running) ▸ click Options ▸ click the Notify tab. Make sure Show Dialog is selected for the item types and priorities you want.

## Turning off Notification

1. Make sure Notify is running.
2. Right-click on the Windows taskbar ▸ click Exit.

## Setting How Often Notify Checks for New Items

1. Make sure Notify is running.
2. Right-click on the Windows taskbar ▸ click Options.
3. Type the number of minutes under Check for Mail Every.

## Setting How to be Notified When Outgoing Messages Change Status

1. Make sure Notify is running.
2. Right-click on the Windows taskbar ▸ click Options.
3. Click the Return Status tab.
4. Click Use Same Settings for All Types so that it is deselected.
5. Click the Settings For drop-down list ▸ click the item type you want to make selections for.
6. Click how you want to be notified for different status changes of that item type.

**Tips**

- Leave Use Same Settings for All Types selected if you want to be notified the same way for all item types.

## Setting How to be Notified of Items in Your Mailbox

1 Make sure Notify is running.

2 Right-click  on the Windows taskbar ▸ click Options.

3 Click the Notify tab.

4 Click Use Same Settings for All Types so that it is deselected.

5 Click the Settings For drop-down list, then click the item type you want to make selections for.

6 Click how you want to be notified for different priority levels of that item type.

> **Tips**
>
> - Leave Use Same Settings for All Types selected if you want to be notified the same way for all item types.

## Getting Notified of Someone Else's Messages

When you start GroupWise, you are already subscribed to Notify. To subscribe to someone else's notification, use the following steps:

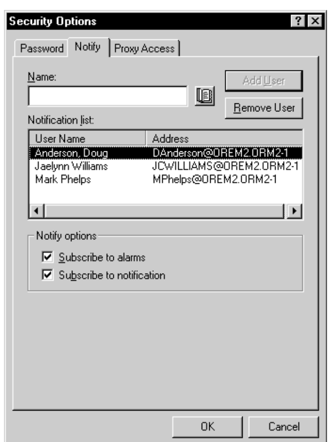
1 In the Main Window, click Tools ▸ Options.

2 Double-click Security ▸ click the Notify tab.

3 Type the name of a user for whom you proxy.

4 Click Add User.

5 Make sure Subscribe to Notification and Subscribe to Alarms are selected.



6 Click OK.

> **Tips**
>
> - Notify must be running for you to receive notification of alarms, incoming items, or change in return status of outgoing items.
> - You can receive notification for someone else only if he or she has given you proxy rights plus appropriate rights in his or her Access List. See *Giving Other People Access to Your Mailbox* under *Managing Your Mailbox*.
> - You cannot receive notification for someone who is on a different post office than you.

# Archiving the Items in Your Mailbox

Use Archive to save mail or phone messages, appointments, notes, or tasks to a designated database on a local drive. Archiving items saves network space and keeps your Mailbox uncluttered. For example, if you have important items in your Mailbox that are not currently relevant to your work, you can archive them. You can view archived items whenever you need to. You can also unarchive any archived item. When you archive an item you have sent, you will not be able to track the status of that item. Archive is not available in Remote.

## Archiving an Item in Your Mailbox

1 If you have not previously done so, specify the archive path in File Location in the Environment dialog box.

2 Select the items in your Mailbox you want to archive.

3 Click Actions ▸ Archive.

> **Tips**
>
> - When you archive an item you have sent, you cannot track the status of that item.
> - Archive is not available in Remote.

## Viewing Archived Items

1. In the Main Window, click File ▸ Open Archive.

## Unarchiving Items

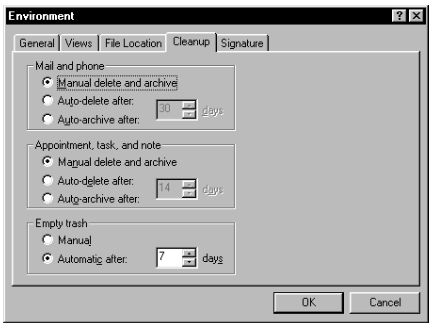
1. Click File ▸ Open Archive.
2. Click the item you want to unarchive ▸ Actions ▸ Archive.
3. Click File ▸ Open Archive to return to the Main Window.

**Tips**

- Unarchived messages are returned to the folder from which they were archived. If the folder has been deleted, GroupWise creates a new folder.

## Archiving Items Automatically

1. Click Tools ▸ Options.
2. Double-click Environment ▸ click the Cleanup tab.




3. Select Auto-archive After for the item type you want.
4. Specify the number of days after the item is delivered or completed that you want it to be archived.
5. Click OK.

# Printing Items in Your Mailbox

Use Print to print one or more items from your Mailbox or Calendar and any attachments. You can also print an item that you are currently reading or creating. Set up your printer using the Windows Printers Control Panel.

Use Print Calendar to print appointments, tasks, and notes in different formats and on various page sizes. For example, you could print a day calendar with all your appointments or a week calendar with all your appointments and tasks.

You can coordinate your Franklin Day Planner with your GroupWise Calendar two ways. You can print your schedule onto blank paper in various formats and sizes that can be trimmed to fit into your planner, or you can print your GroupWise schedule on the preprinted pages that come with your planner.

You can also print your schedule in a simple text-only list of your appointments, tasks, and notes.

You can use the multi-user feature to print the calendars of several users. See *Printing Your Schedule* below.

You can print an attached file from the application in which it was created, if you have access to that application.  Or, you can print an attached file from GroupWise. Printing from GroupWise may save time since another application doesn't have to be opened; however, the attached file may print with slightly different formatting.

## Printing GroupWise Items

1. In the Item List in your Mailbox, click or open the item you want to print. Ctrl+click to select multiple items.
2. Click File ▸ Print.
3. Click the items you want to print.
4. Click Print.

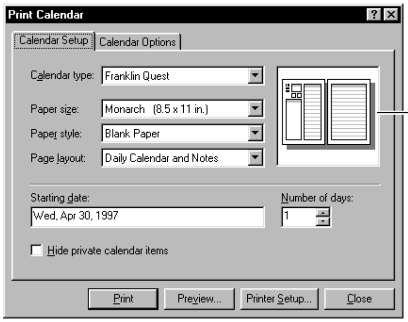
**Tips**

- You can print attachments from GroupWise. You can also print attachments from the associated application.

## Printing Your Schedule

1. Click  on the toolbar.

2 Click an option in the Calendar Type drop-down list.




*You can see what the printed calendar will look like in the View box.*

3 Click an option in the Paper Size drop-down list. The options available depend on the calendar type selected.

4 Click an option in the Paper Style drop-down list.

5 Click a page layout type in the Page Layout drop-down list.

6 Specify the first date you want to print in the Starting Date box.

7 Specify the number of days to print in the Number of Days box.

8 If you want to exclude appointments, tasks, and notes marked Private, click Hide Private Calendar Items.

9 Click the Calendar Options tab ▸ specify the options you want.

These options may vary, depending on the calendar type selected.

10 Click Printer Setup ▸ select a printer in the Name drop-down list.

11 If you are printing onto preprinted forms that will be fed manually into the printer rather than fed from a paper tray, click Properties ▸ an option in the Paper Source drop-down list ▸ click OK twice.

12 Click Print.

**Tips**

- Use Print Calendar to print your schedule in one of a variety of formats or to print pages for your Franklin Day Planner with appointments, tasks, and notes from your GroupWise Calendar.
- Click the Preview button to see how the schedule looks with the selected options.
- For additional information on unusual printing circumstances, click Help ▸ In Other Words ▸ type Print Schedule ▸ double-click To Print Your Schedule.

**Printing an Attached File from GroupWise**

1 Open or click the item containing the attached file.

2 Click File ▸ Print.

3 Click the attached file you want to print.

Ctrl+click other files to print more than one attachment.

4 Click Print.

**Printing an Attached File from Another Application**

1 Open or click the item containing the attached file.

2 Click File ▸ Print.

3 Click the attached file you want to print.

Ctrl+click other files to print more than one attachment.

4 Click Print Attachment with Associated Application ▸ Print.

**Printing Status Information About an Item**

1 Right-click in the Properties window ▸ click Print.

The information is sent immediately to the printer.

# Creating Rules

Use Rules to define a set of conditions and actions to be performed when an item meets those conditions. You can specify such actions as moving items to folders, forwarding and replying to items, and more. Rules can help you organize your Mailbox, automate your Mailbox when you are away, or delete unwanted items.

When you create a rule, you must do the following:

- Name the rule.
- Select an event. The event is the trigger that starts the rule.
- Select the types of items that will be affected by the rule.
- Add an action. The action is what you want the rule to do when it is triggered.
- Save the rule.

You can specify many more options to limit which items a rule affects. For example, you can apply a rule to only accepted appointments, to items with a certain word in the Subject box, or to items with a high priority.

Use Define Conditions to further limit the items affected by a rule. For example, you can specify that you want the rule to affect appointments that have been accepted, or mail messages with certain words in the Subject line, and numerous other possibilities.

If you've created a rule that you don't want to act on items continually, you can run it manually as needed. For example, instead of a rule always moving certain items into a folder, you may want the items to accumulate in your Mailbox until you're ready for them to be moved all at once.

A rule must be enabled before it can be triggered. When a rule is enabled it is marked with a check. When you disable a rule, the rule cannot be triggered. However, the rule is still listed in the Rules dialog box so you can enable the rule when you need it again.

## Assigning Rule Actions

Each rule must have an action assigned. The action is what the rule does when the rule criteria is met. For example, if you've been reassigned to a new project, you can create a rule that forwards each new item dealing with the old project to your replacement. The following list explains each rule action.

| Action | Result |
|---|---|
| Send Mail | Sends a prepared mail message to the recipients you specify when the rule conditions are met. For example, assume you need to inform your boss each time you receive a monthly report from another group of people. Your boss may not want to see the report; he or she simply needs to know that you've received it. |
| Forward | Forwards items to one or more users when the rule conditions are met. For example, assume a co-worker has agreed to handle your mail while you're away. You decide what type of incoming items you want your co-worker to handle and create a rule to forward those items. |
| Delegate | Delegates an appointment, note, or task to another user when the rule conditions are met. For example, assume someone agrees to cover for you while you're away from the office. Your rule can delegate appointments, tasks, or notes to that person. The original sender can find out whom you have delegated the item to in the Properties window. |
| Reply | Sends a prepared reply to the sender when the rule conditions are met. For example, if you have to be out of the office for several days, your rule could send a reply to incoming items indicating where you are, when you'll be back, and whom to contact for urgent business.<br><br>When you send automatic replies, you should typically reply only to high-priority items and items in which the sender has requested a reply. This way, your replies aren't sent to mail list groups and company-wide mail. |
| Accept | Accepts an appointment, note, or task when the rule conditions are met. For example, your rule could accept all appointments from a specific individual. |
| Delete/Decline | Deletes or declines any item when the rule conditions are met. For example, your rule could decline any appointment scheduled for a certain day of the week if you are always unavailable for meetings on that day. |

| Action | Result |
|---|---|
| Empty Item | Deletes the items from the Trash when the rule conditions are met. The items are not recoverable after they are emptied from the Trash. |
| Move to Folder | Moves items to a folder when the rule conditions are met. For example, you may want all items with certain words in the Subject box moved to a common folder. |
| Link to Folder | Links items to one or more folders when the rule conditions are met. Linking an item to a folder lets you view the item from more than one folder. For example, if you have an item that relates to Marketing and Personnel, you can place it in the Marketing folder, then link it to the Personnel folder. You can then open the item from either folder. |
| Mark as Private | Marks all items matching the rule conditions as private. When an item is marked private, you can restrict your proxies from having access to the item. |
| Mark as Read | Marks all items matching the rule conditions as if they have been read. For example, assume you are skimming a reply thread in a shared folder. If you didn't want to follow the thread anymore, your rule could mark all the items in the thread as if they had been read so they wouldn't sort at the top of the Item List. |
| Archive | Archives items when the rule conditions are met. For example, your rule could archive all items regarding a certain subject. |
| Mark as Unread | Marks all items matching the rule conditions as if they have not been read. Usually, you will click Actions ▸ Read Later to mark an item unread. A rule action is also available in case you want to automate this process or apply the unread status to several items at once. |
| Stop Rule Processing | Stops other rules from acting on items that meet the rule conditions. Remember that rules are executed in the order they are listed in the Rules dialog box. If there are other rules that would normally affect these items, this rule action will prevent the other rules from executing. |

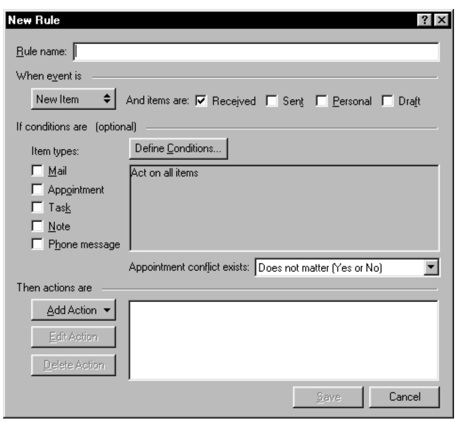
## Selecting Events that Trigger a Rule

An event is the trigger that activates the rule. The different types of events are explained below.

| Event | Result |
|---|---|
| New Item | The rule is triggered when a new item is placed in your GroupWise Mailbox. Clicking Received lets only incoming items trigger the rule. Clicking Sent lets only items you send trigger the rule. Clicking Personal triggers the rule each time you create a personal appointment, note, or task. Clicking Draft lets only items marked as unfinished, or draft, trigger the rule. |
| Filed Item | The rule is triggered when an item is placed in a specific folder. If you do not specify a folder, the rule is triggered when an item is moved to any folder. |
| Open Folder | The rule is triggered when you open a specific folder. If you do not specify a folder, the rule is triggered when you open any folder. |
| Close Folder | The rule is triggered when you close a specific folder. If you do not specify a folder, the rule is triggered when you close any folder. |
| Startup | The rule is triggered when you start GroupWise. |
| Exit | The rule is triggered when you exit GroupWise. |
| User Activated | The rule can only be triggered manually by selecting the rule in the Rules dialog box, then clicking Run. |

## Creating a Rule

**1** Click Tools ▸ Rules ▸ New.




**2** Type a name in the Rule Name box.

**3** Click the When Event Is pop-up list ▸ click an event to trigger the rule.

4 If you clicked New Item, Startup, Exit, or User Activated, click one or more sources for the item. For example, click Received and Personal.

*or*

If you clicked Filed Item, Open Folder, or Close Folder, click the folder icon ▸ a folder ▸ OK to display the folder name.

5 Click one or more types of items you want the rule to act on in the Item Types list.

6 If you want to further restrict the items affected by the rule, click Define Conditions ▸ click the appropriate options ▸ OK.

7 Click Add Action ▸ click the action you want the rule to perform.

Some actions such as Send Mail and Reply require you to fill in additional information.

8 Click Save.

**Tips**

- If Save is dimmed, you may have forgotten to type a rule name or add an action.

## Copying a Rule to Make a New Rule

1 Click Tools ▸ Rules.

2 Click the rule you want to copy ▸ Copy.

3 Type the name of the new rule.

4 Make the appropriate changes to the rule.

5 Click Save.

## Editing a Rule

1 Click Tools ▸ Rules.

2 Click the rule you want to edit ▸ Edit.

3 Make the appropriate changes to the rule.

4 Click Save.

## Deleting a Rule

1 Click Tools ▸ Rules.

2 Click the rule you want to delete ▸ Delete.

3 Click Yes.

## Limiting Items Affected by a Rule

1 In the New or Edit Rules dialog box, click Define Conditions.

2 Click the Down-arrow in the first box ▸ click a field.

3 Click the operator drop-down list ▸ click an operator.

4 Type the criteria for the rule or click the Down-arrow if provided, then click an existing criteria.

If you type criteria, such as a person's name or a subject, you can include wildcard characters such as an asterisk (*) or a question mark (?). Text you type is not case-sensitive.

5 Click the last drop-down list ▸ click End.
*or*
Click And or Or to further limit the items affected by the rule.

---

## Running a Rule Manually

1 Click the items or folders that you want affected by the rule.

2 Click Tools ▸ Rules.

3 Click the rule you want to run manually.

4 Click Run ▸ Close.

**Tips**

- The rule actions occur after you close the Rules dialog box.

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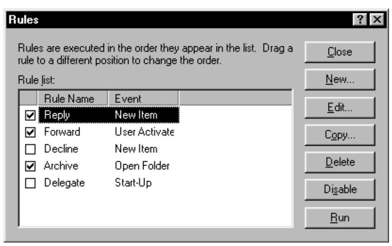
## Enabling or Disabling a Rule

1 Click Tools ▸ Rules.




2 Click the rule you want to enable or disable.

3 Click Enable or Disable.

This button toggles between Enable and Disable.

**Tips**

- An enabled rule has a check mark in the box.
- You can also click in the box next to the rule name to enable or disable a rule.

# Giving Other People Access to Your Mailbox

Proxy lets one user manage, or act as a proxy for, another user's Mailbox and Calendar. A proxy can perform various actions, such as reading, accepting, and declining items on behalf of another user, within the restrictions the other user sets.

## Receiving Proxy Rights

Two preparatory steps must be completed before you can act as someone's proxy. First, the person for whom you plan to act as proxy must grant you rights in the Access List in Options. Second, you must add that user's name to your Proxy List so you can access his or her Mailbox or Calendar easily.

Once you have completed preparations to act as a proxy, click that person's name in your Proxy pop-up list whenever you need to manage his or her Mailbox or Calendar.

## Granting Proxy Rights

Use the Access List in Security Options to give other users rights to proxy for you. You can assign each user different rights to your calendaring and messaging information. If you want to let users view specific information about your appointments when they do a Busy Search on your Calendar, give them Read access for appointments. The following table describes the rights you can grant to users:

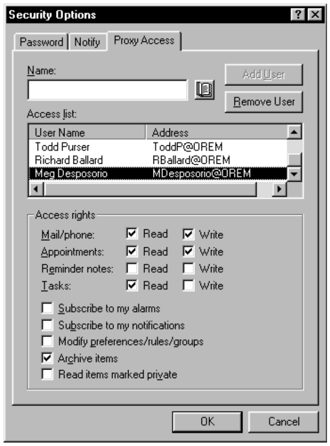
| This right | Lets your proxy do this |
|---|---|
| Read | Read items you receive. |
| Write | Create and send items in your name. |
| Subscribe to my alarms | Receive the same alarms you receive. |
| Subscribe to my notifications | Receive notification when you receive items. |
| Modify options/rules/groups | Change the options in your Mailbox. The proxy can edit any of your options settings, including the access given to other users. If the proxy also has Mail rights, he or she can create or modify rules and personal groups. |
| Archive items | Store and read your items in his or her archive folder. If you give a proxy Archive rights, items archived by that proxy may be stored on his or her hard disk and will be inaccessible to you. |

## Editing Your Access List

1. Click Tools ▸ Options.
2. Double-click Security ▸ click the Proxy Access tab.
3. To add users to the list, click  ▸ click the user who will proxy for you ▸ click OK.

   To select multiple users, press Ctrl while you click each user.
4. Click a user in the Access List.

5 Select the rights you want to give to the user.




6 Repeat Steps 4-5 to assign rights to each user in the Access List.

7 To delete a user from the Access List, click the user ▸ Remove User.

8 Click OK.

**Tips**

- You can select Minimum User Access in the Access List to assign a default set of rights to all users in the Address Book. For example, if you want all users to have rights to read your mail, you would assign Read rights to Minimum User Access. Normally, unless you want everyone to have at least some access to your Mailbox, Minimum User Access should have no rights.

## Managing Someone Else's Mailbox or Calendar

1 In the Main Window or Calendar, click  to access the Proxy pop-up list.

2 Click the name of the person whose Mailbox you want to access.

3 Click ▸ click your own name to return to your own Mailbox when you have finished your work in the other person's Mailbox.

**Tips**

- Remember that before you can act as a proxy for someone, that person must give you proxy rights in the Access List in Options. Before you can click that person's name in your Proxy pop-up list, you must add it to your Proxy pop-up list.
- You may have limited access to the other user's Mailbox, depending on the rights the user assigned you in the Access List in Options.
- You can act as a proxy for any user on your post office who gives you rights. If you want to act as a proxy for a user on another post office, client/server must be enabled on the destination post office.
- You can work with several Mailboxes open at one time. You can tell the Mailboxes apart by checking the Mailbox owner's name, which appears as the user label for each Mailbox.

## Adding a User to Your Proxy Pop-up List

1. In the Main Window or Calendar, click .
2. Click Proxy.
3. Specify the person whose Mailbox you want to access ▸ click OK.
4. Click again to see the person's name in your Proxy pop-up list.

**Tips**

- Now that you have added the person's name to your Proxy pop-up list, you can click it whenever you want to access the Mailbox. To return to your own Mailbox, click your own name in the Proxy pop-up list.
- Remember, you must be given proxy rights in the Access List in Options before you can act as a proxy for another user.

## Deleting a User from Your Proxy Pop-up List

1. In the Main Window or Calendar, click .
2. Click Proxy.
3. Click the name you want to remove ▸ click Remove.
4. Click OK.

**Tips**

- Removing a user from your Proxy pop-up list does not remove your rights to act as a proxy for that user. The user whose Mailbox you access must change your rights in the Access List in Options.

## Marking an Item Private

You can limit who has access to individual items in your Mailbox or Calendar by marking items Private.

When you mark an item Private, you prevent unauthorized proxies from opening it. Unauthorized proxies are proxies to whom you have not given rights to open items marked Private. Proxies cannot access items marked Private unless you give them those rights in your Access List.

If you mark an item Private when you send it, neither your proxies nor the recipient's proxies can open the item without rights. If you mark an item Private when you receive it, it cannot be read by your unauthorized proxies, but it can be read by the sender's proxies.

1. To mark an item in your Item List Private, click the item ▸ click Actions ▸ Mark Private.

   *or*
2. To mark an item in your Calendar Private, click an item in the Appointments, Notes, or Tasks list ▸ click Actions ▸ Mark Private.

# Opening and Emptying the Trash

All deleted mail and phone messages, appointments, tasks, documents, and notes are stored in the Trash. Deleted items can be viewed, opened, or returned to your Mailbox until the Trash is emptied (emptying the Trash removes items in the Trash from the system). You can empty your entire Trash, or empty only selected items. Items in the Trash are emptied according to the days entered in the Cleanup tab in Environment Options, or you can empty the Trash manually.

## Opening Your Trash

1 In your Folder List, click .

**Tips**

- You can open, save, and view information on items in the Trash. You can also remove items from the system or return them to the Mailbox. Right-click an item in the Trash to see a QuickMenu™ of these options.

## Removing an Item from the Trash and Returning It to the Mailbox

1 In your Folder List, click .

2 Select the item(s) you want to undelete.

3 Click Edit ▸ Undelete.

**Tips**

- The undeleted item is placed in the folder from which it was originally deleted. If the original folder no longer exists, the item is placed in your Mailbox.
- You can also restore an item by dragging it from the Trash folder to any other folder.

## Saving an Item That Is in Your Trash

1 Click  in the Folder List.

2 Click the item you want to save.

3 Click File ▸ Save As.

4 In the Save File As text box, type a filename for the item.

5 Click Browse to save the item in a different directory than is shown in the Current Directory text box ▸ click OK.

6 Click Save ▸ Close.

**Tips**

- When you save an item that is in your Trash, GroupWise provides a filename using the subject line with a .MLM extension. You can use this name or type a different filename in the Save File As text box.
- To save items, you can also right-click the item ▸ click Save As to open the Save dialog box.
- To have GroupWise report any filename conflicts, click the Report Filename Conflicts check box.

## Emptying the Trash

1 Click Edit ▸ Empty Trash ▸ Yes.

**Tips**

- You do not have to open the Trash folder to empty the Trash.

## Emptying Selected Items from the Trash

1 In your Folder List, click .

2 Select one or more items.

To select more than one item, press Ctrl while you click the items.

3 Click Edit ▸ Delete ▸ Yes.

**Tips**

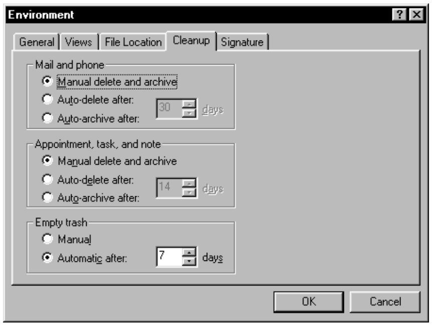
- To select a range of items, click the first item in the range ▸ press the Shift key while selecting the last item in the range.

### Emptying the Trash Automatically

1 Click Tools ▸ Options.

2 Double-click Environment ▸ click the Cleanup tab.

3 Click the Automatic After button in the Empty Trash box ▸ specify the number of days between automatic deletions.




4 Click OK.

## Deleting Items from Your Mailbox

Use Delete to remove one or more selected items from your Mailbox. Or use Delete to remove selected text in an item. You can also use Delete to delete folders, documents, connections, and more. You can also use Delete to retract items you have sent. You can retract mail and phone messages if the recipients have not read them. You can retract appointments, notes, and tasks at any time.

### Deleting an Item from Your Mailbox

1 In the Main Window, click the item you want to delete. To select multiple items, press Ctrl as you click each item.

2 Click Edit ▸ Delete.

**Tips**

- When you delete outgoing items, the Delete Item dialog box appears. Select the appropriate Delete From option.
- You can also right-click items in the Main Window and click Delete.
- If you delete a document reference from your Mailbox, only the reference is deleted. The document remains in the Library.
- Deleted items are moved to your Trash, and remain there until the Trash is emptied. You can view or undelete items in your Trash.

# Saving Items in Your Mailbox

You can save items and attachments as files on your hard disk, in a personal network folder, or on a diskette.

When you save an item in your Mailbox, GroupWise leaves the item in your Mailbox and saves a copy of it as a text file in the location you specify.

Use the Work In Progress Folder to save messages you have started but want to finish later.

Once an item is saved, you can retrieve the item into another application, such as WordPerfect®.

## Saving an Item in Your Mailbox

1. Click the item you want to save ▸ click File ▸ Save As.
2. Type a filename for the item in the Save File As text box.

   When you save an item, GroupWise uses the subject line as the filename with a .MLM extension. You can use this name or type a different one in the Filename text box.
3. To save the item in a different directory than is shown in the Current Directory text box, click Browse.
4. To have GroupWise to prompt you to replace an existing file with the same name, click Report Filename Conflicts.
5. Click Save ▸ Close.

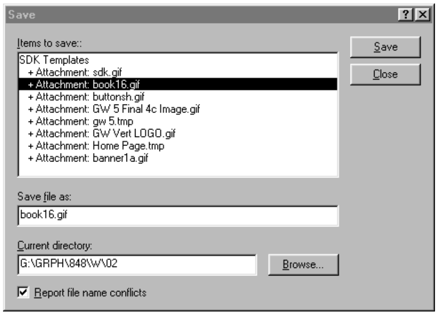
**Tips**

- You can save attachments by selecting the attachment in the Items to Save list box.
- You can also right-click an item ▸ click Save As to open the Save dialog box.

## Saving an Attachment

1. Click the item containing the attachment you want to save.
2. Click File ▸ Save As ▸ click the attachment you want to save.

3 In the **Save File As** text box, type a filename for the attachment.




4 To save the item in a different directory than is shown in the Current Directory text box, click **Browse** ▸ click a drive ▸ click a folder ▸ **OK**.

5 If you want GroupWise to prompt you to replace an existing file with the same name, click the **Report Filename Conflicts** check box.

6 Click **Save** ▸ **Close**.

## Saving Status Information

1 Click an item ▸ **File** ▸ **Properties** to display the status information.

2 Click **File** ▸ **Save As**.

3 Type a filename.

4 If you want the file to have an extension, type one in; GroupWise does not add one for you.

5 Click **Save**.

**Tips**

- The text is saved in WordPerfect 6.1 format.

## Saving an Unfinished Item

1 From the item view, click **File** ▸ **Save Draft**.

2 Select the folder you want to save the item to ▸ click **OK**.

**Tips**

- The draft message is placed in the folder you chose in Step 2. The default folder for unfinished messages is the Work In Progress Folder.
- You can also save an item by clicking **Cancel** in the item view. Click **Yes** when you are asked if you want to save the message. It is then placed in the folder you specify.

# Owning Resources

Resources are items that can be scheduled for meetings or other uses. Resources can include rooms, overhead projectors, cars, and more. The system administrator defines a resource by giving it an identifying name and assigning it to a user. A user assigned to a resource is the owner of that resource and has full proxy rights to receive notification of appointments and accept or decline appointments.

Resources can be included in a Busy Search, just as users can. Resource IDs are entered in the To box.

The owner of a resource is responsible to accept and decline appointments for the resource. The owner is able to do this by having full proxy rights to the resource. The owner of a resource must be on the same post office as the resource.

As the owner of a resource, you can accept or decline requests for that resource. You may want to subscribe to notification so you are notified each time the resource is requested.

## Accepting and Declining Resource Requests

1. In the Main Window or Calendar, click .
2. Click the resource you own.
3. If the resource you own isn't listed in the Proxy pop-up list, click Proxy ▸ type the name of the resource you own in the Name text box ▸ click OK.
4. Double-click the item you need to accept or decline.
5. Click Actions ▸ Accept or Decline.

**Tips**

- You can accept or decline resource requests only if you are the owner and have been granted read and write access rights. You and the resource you own must exist on the same post office.

## Receiving Notification When a User Requests a Resource

1. In the Main Window, click Tools ▸ Options ▸ double-click Security ▸ click the Notify tab.
2. In the Notification list box, click the resource.
3. Make sure Subscribe to Notification is selected ▸ click OK.

**Tips**

- If you do not see the resource listed in Step 2 above, click Add User ▸ double-click the resource you own ▸ click OK.

## Creating a Rule for a Resource

As the owner of a resource, you have full proxy rights to that resource, including creating rules. The following steps show you how to create a rule that accepts all requests for an available resource. This is an example of one rule that is useful for a resource. You can create numerous other rules that perform different actions. For example, you might create a rule that declines requests for a resource that is already scheduled. See *Creating Rules* under *Managing Your Mailbox*.

1. In the bottom left corner of the Main Window or the top left corner of the Calendar, click .
2. Click the resource you own.
3. If the resource you own isn't listed in the Proxy pop-up list, click Proxy ▸ type the name of the resource you own in the Name text box ▸ click OK.
4. Click Tools ▸ Rules ▸ New.
5. Type a name for the rule.
6. Click Appointment. Make sure the other item types are deselected.
7. Click the Appointment Conflict Exists drop-down list ▸ click No.
8. Click Add Action ▸ Accept ▸ type a comment if desired ▸ click OK.

   The rule accepts the appointment for the resource only if the resource is available.
9. Click Save ▸ Close.

# Using Your Phone with GroupWise

# Using PhoneAccess

PhoneAccess and GroupWise® work together to place telephone messages in your Mailbox. PhoneAccess has an electronic voice that can read messages and Calendar items to you. You can respond by accepting appointments, forwarding or faxing items, and sending messages to others via sound files.

PhoneAccess is different than Conversation Place. Use Conversation Place to manage your telephone directly from the GroupWise desktop. You can answer your phone, place callers on hold, use the speaker phone, conference other callers, and more. You can even look up phone numbers and dial numbers directly from the Conversation Place. See *Using Conversation Place* under *Using Your Phone with GroupWise*.

Phone Message is simply a view, like a task or mail view. You cannot answer your phone from a phone message. Use the Conversation Place to manage your telephone directly from the GroupWise desktop.

## Listening to Items in Your Mailbox

1. Dial the PhoneAccess telephone number for your organization.
2. Follow the instructions PhoneAccess gives you. The instructions are in menu format from your telephone keypad.

**Tips**

- PhoneAccess provides menus you access through pressing numbers on your telephone's keypad, which let you listen to your telephone messages, mail messages, calendar items, and so on.
- If you have voice mail, you can view these items through your Mailbox, too. However, you must have a sound card in order to listen to items through GroupWise and PhoneAccess.

## Sending an Audio Phone Message

1. Call the person on the telephone.
2. If there is no answer, leave a voice mail message.

**Tips**

- You must have PhoneAccess in order to place voice mail items in a person's Mailbox. The person you are calling must also have PhoneAccess and a sound card in order to listen to your message through GroupWise.
- The recipient can access your message through the telephone or through e-mail.

# Using Dial Sender

Use Dial Sender to call the sender of an item. When you select Dial Sender, Conversation Place opens and completes your telephone call.

### Calling the Sender of an Item

1 Click Tools ▸ Dial Sender.

Conversation Place opens, then it completes the telephone call for you.

**Tips**

- The sender must have a telephone number in order for Conversation Place to complete the call.

# Using Conversation Place

Conversation Place lets you manage your telephone directly from your desktop. You can answer your phone, place callers on hold, use the speaker phone, conference other callers, and more. You can even look up phone numbers and dial numbers directly from Conversation Place.

Conversation Place is a component within the GroupWise environment. It exposes and simplifies many commonly available, yet little-used features of the telephone. Address Book is closely integrated with Conversation Place to provide quick and easy access to any user information listed in corporate and personal address books.

Conversation Place can control phones using either TAPI or TSAPI. TAPI requires either a modem or a TAPI service provider and TAPI32.DLL installed on client computers. TAPI32.DLL is installed by default when Windows® is installed. TSAPI requires a working TSAPI TServer, CSTA32.DLL, and Novell® Client 32™ installed on client computers.

### Starting Conversation Place

1 In the GroupWise Main Window, click Tools ▸ Conversation Place.

## Calling Someone

1 Begin typing the name of the person in the Enter Name box until the name you want appears.

2 Click Dial.

**Tips**

- If the person you want to call is not listed in your GroupWise Address Book, type the number you want to call in the Enter Phone Number box.
- To dial one of the ten most recent outgoing or incoming numbers, click Recent Calls ▸ the number.
- To look up names and numbers in the GroupWise Address Book, click .

## Placing a Conversation on Hold

1 Click Hold.

**Tips**

- To reactivate a conversation, click Hold again. You can also click the button representing the conversation you want to reactivate on the Callbar at the bottom of the Conversation Place window.

## Hanging Up

1 Click Hang Up.

## Transferring a Call

1 Click Transfer.

2 Begin typing the name of the person in the Enter Name box until the correct name appears.

3 To announce the new call to the person you are transferring to, click Dial ▸ announce the call ▸ click Transfer.
*or*
To transfer immediately, click Transfer.

**Tips**

- If the person you want to call is not listed in your GroupWise Address Book, type the number you want in the Enter Phone Number box.
- To look up names and numbers in the GroupWise Address Book, click .

## Dialing a Recently Used Number

1 Click Recent Calls ▸ the phone number or name.

**Tips**

- The ten most recent outgoing and incoming numbers appear on the Recent Calls list.

## Placing a Conference Call

1 While you have either an active conversation or a caller on hold, click Conference.

2 Begin typing the name of the person you want to conference in the Enter Name box until the correct name appears.

3 Click Dial.

**Tips**

- To look up names and numbers in the GroupWise Address Book, click .

## Merging Conversations

Use Merge to connect two existing conversations. For example, if you are talking to one caller while you have another caller on hold and you realize all three of you need to be in the same conversation, instead of hanging up on one caller and calling back to conference, you can simply merge the calls. If you have more than two active conversations, Conversation Place lets you choose the conversations you want to merge. To add a new caller to an existing conversation, use Conference.

1 While you have one caller on hold and an active conversation, click Merge.

## Specifying Information About Your Location

Use Location Information to tell Conversation Place how your phone system works so your calls are dialed correctly. You can set default phone systems, extension number ranges, access methods, and city codes. You can create several settings and select the one appropriate to where you are working.

### Selecting a Location Setting

1 Click Edit ▸ Locations.

2 Click a location name in the Location Name drop-down list.

### Creating a Location Setting

1. Click Edit ▸ Locations.
2. Specify the location options you want for this location.
3. Click New.
4. Type a name for the new setting ▸ click OK.

**Tips**

- You can create as many location settings as you want, and then use them wherever you go.

# Using GroupWise Away from the Office

# Using GroupWise Remote: An Overview

GroupWise® Remote makes it possible for you to access your Mailbox and send and receive mail, among other things, when you are away from the office.

For GroupWise Remote to work you must have a Master Mailbox on a networked GroupWise system.

### Master and Remote Mailboxes

To use GroupWise away from your office, you must have an existing GroupWise Mailbox, called your Master Mailbox, in your master GroupWise system. You retrieve a copy of your Master Mailbox to your laptop or home computer. This copy is called your Remote Mailbox.

Remote exchanges items and information between your Master Mailbox and the Mailbox on your Remote computer. When you use GroupWise in the office, the Mailbox you open is your Master Mailbox. When you use GroupWise away from your office, the Mailbox you open is your Remote Mailbox.

When you send an item from your Remote Mailbox, Remote sends the item to your master GroupWise system the next time you connect. From there, GroupWise distributes it to the recipients. When someone at your master GroupWise system sends an item to you, it is delivered to your Master Mailbox. You then use Remote to retrieve the item to your Remote Mailbox.

### Sending and Retrieving Items

Whenever you perform an action, such as sending a mail message, that requires information to be sent to your Master Mailbox, Remote creates a request. For example, requests are created whenever you perform any of the following actions:

- Send, forward, or reply to an item
- Create a personal item, folder, group, or rule
- Open, delete, retract, or undelete an item; or empty the Trash
- Request to download items, folders, and more from your Master Mailbox
- Move an item to or from a folder
- Change, enable, or disable a rule
- Delete a folder or rule

All requests are listed in the Pending Requests to Master Mailbox dialog box. When you connect to your GroupWise system, listed requests are sent to your Master Mailbox. For example, if you request all unopened mail messages, that retrieval request is sent to your Master Mailbox. Your Master Mailbox collects the items you requested, then GroupWise retrieves them to your Remote Mailbox.

### Connection Types

To access your Master Mailbox, you must connect to your GroupWise system through a modem connection, a network connection, or a TCP/IP connection.

You will most likely use Remote away from the office with a computer that has no network access. In these situations, you can use a TCP/IP connection or a modem connection to connect to your master GroupWise system. Modem connections dial into a gateway in your GroupWise system. TCP/IP connections use unique IP

(Internet Protocol) address and port information to connect to your master GroupWise system.

You can also use Remote in your office and connect to your master GroupWise system via a TCP/IP connection or a network drive mapping. These connections are useful to download large quantities of information, such as your system Address Book.

## Using GroupWise Features in Remote

After setting up your Remote Mailbox on a laptop or on a desktop computer that is not in your office, you can use GroupWise away from your office.

When using the following common GroupWise features in your Remote Mailbox, the actions are saved as requests. The next time you connect to your master GroupWise system, the requests are processed by your Master Mailbox.

- Read, edit, or delete an item
- Reply to an item
- Forward, delegate, or resend an item
- Move or link an item
- Accept, decline, or complete an item
- Empty the Trash
- Create folders or move items into folders
- Create or edit rules
- Create or edit personal address books

Other common GroupWise features remain specific to your Remote Mailbox setup and are never sent to or retrieved from your Master Mailbox.

- Set options
- Create, delete, or save views
- Set alarms
- Print
- Filter or sort items
- Spell Check

The following GroupWise features are not available in your Remote Mailbox because they do not apply in a remote situation.

- Access List
- Archive
- Proxy

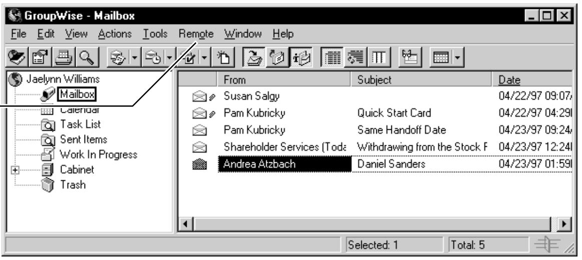
## Using Smart Docking

GroupWise automatically processes outstanding Remote requests when you run GroupWise on your docked laptop after you return to the office. For example, you may have sent an item while you were away from your office, but didn't connect to the master GroupWise system to process that request. When you return to the office and run GroupWise, you are asked if you want to process the outstanding requests. To see what requests still need to be processed, click Requests.

## Making Sure You're Using Your Remote Mailbox

The Remote Mailbox and Master Mailbox are almost identical. However, you can tell which Mailbox you are using by looking at the menu bar. If your menu bar includes the Remote menu, you are running GroupWise against your Remote Mailbox.

*The Remote menu displays when you are using your Remote Mailbox.*




# Preparing to Use Remote

Before leaving the office, you need to use Hit the Road to set up and update your Remote Mailbox. If you run GroupWise on a docked laptop in your office, use Hit the Road to create your Remote Mailbox on the same machine. You can also use Hit the Road to create setup files on a diskette to set up your Remote Mailbox on a laptop or a computer that's not connected to your network, such as your home computer.

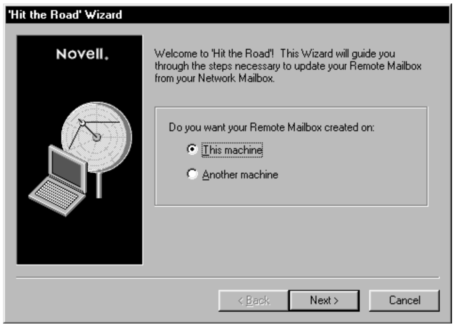
When you first use Hit the Road, it does the following:

- Prompts you to assign a password to your Master Mailbox if you haven't assigned one yet
- Sets up your Remote Mailbox on the docked laptop that is currently connected to the network with your master GroupWise system, or copies setup files on a diskette so you can set up a computer that has no direct network access
- Creates a network (direct) connection if you're connected to the post office via a drive mapping, or creates a TCP/IP connection if you're running GroupWise in client/server mode
- Creates modem connections for all asynchronous gateways detected in your master GroupWise system

Use Hit the Road to update your Remote Mailbox with messages, rules, address books, and documents from your Master Mailbox. Updating your Remote Mailbox before leaving your office saves you time and money, and ensures that you have the necessary information with you. When you're away from your office, use Send/Retrieve to retrieve the Master Mailbox items.

## Setting Up Your Remote Mailbox

1 Run GroupWise in your office ▸ click Tools ▸ Hit the Road.




2 Type your Mailbox password ▸ click OK.

3 If a Remote Mailbox has been set up previously and you want to create additional setup diskettes, click Back ▸ Back.

4 To create your Remote Mailbox on the docked laptop that is currently connected to the network with your master GroupWise system, click This Machine ▸ Next.

*or*

To copy setup files on a diskette so you can set up your Remote Mailbox on a computer that is not connected to your network (such as your home computer), click Another Machine ▸ Next. Have a diskette ready. When your setup diskette is created, go to Step 6.

If you click This Machine and GroupWise is not installed on the docked laptop, you are prompted to install GroupWise. To use GroupWise away from your office, click Yes to install GroupWise on the computer you're traveling with.

5 Type the path for your Remote Mailbox ▸ click Next.

6 Select the items to copy to your Remote Mailbox ▸ click Finish.

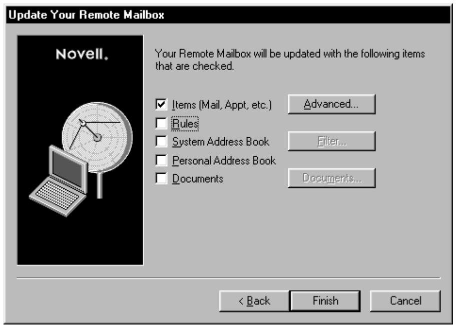
7 If you're setting up your Remote Mailbox on another computer, Hit the Road creates a setup diskette. Insert the diskette into the computer ▸ run SETUP.EXE from the diskette. Make sure GroupWise is installed on the computer. After setting up your Remote Mailbox, you can begin sending/retrieving items and Address Book information from your Master Mailbox.

## Updating Your Remote Mailbox

1 If you run GroupWise in your office on a computer that has a connection to the network or a TCP/IP connection, click Tools ▸ Hit the Road ▸ type your Master Mailbox password ▸ click OK.

*or*

If you run GroupWise away from your office, click Remote ▸ Send/Retrieve to retrieve your Master Mailbox items through a modem or TCP/IP connection.




2 To retrieve messages, make sure Items is selected ▸ click Advanced ▸ click available options in the Items, Date Range, Size Limits, and Folders tabs ▸ click OK.

3 To retrieve rules, click Rules.

4 To retrieve addresses from the system Address Book, click System Address Book ▸ Filter ▸ specify the addresses to retrieve ▸ click OK.

5 To retrieve your personal address books, click Personal Address Books.

6 To retrieve copies of documents from your Master Mailbox, click the Documents check box ▸ click Documents ▸ select your documents ▸ mark applicable documents as In Use ▸ click OK.

Marking a document as In Use prevents others from modifying the document. If you don't plan to edit a document, don't mark it In Use. When you exit an In Use document, you're asked to send the document to the Master Library and mark it as Available. If you're done with the document, click Yes. You can also unmark a document's In Use status by right-clicking the document in your Mailbox ▸ Reset Document Status.

7 Click Finish.

## Specifying Remote Options

When you use Hit the Road to set up your Remote Mailbox, your connection, modem, user, and system information is set up for you in Remote Options. If any of this information changes or if you want to set up additional connections, enter the new information in Remote Options. Your user ID, domain, and post office information is in the system Address Book. If you need help getting this information, ask your system administrator.

If you travel to an area outside of your usual time zone for an extended period of time, you can change the time zone in Windows® to match the local time. Remote Options lets you access the Windows Date/Time Properties dialog box to change your time zone settings.

#### Specifying Time Zone Settings

The items in your Calendar are scheduled according to the time zone settings in the Windows Date/Time Properties. You can access this dialog box in Remote Options. If you use GroupWise in another time zone, you can change to that new time zone so that your scheduled items reflect the time zone difference.

Typically, if you're leaving your office for several days, you will use your Calendar information to attend and schedule appointments. Therefore, you will need to use the local time zone. However, if you're leaving your office for a short time, (for example, a day), you will probably keep the same time zone as your master GroupWise system.

IMPORTANT: If you change time zone settings, be sure to change your computer's clock to match the new time zone. For more information about using Date/Time Properties, see your Windows documentation.

1. Click Tools ▸ Options ▸ double-click Remote.
2. Click Time Zone ▸ the current time zone ▸ click OK.

   You can click your current time zone in the map or the drop-down list.
3. Change your computer's clock to match the new time zone.

> **Tips**
>
> - For more information about using Date/Time Properties, see your Windows documentation.

#### Specifying User and System Information for Your Remote Mailbox

1. Click Tools ▸ Options ▸ double-click Remote.
2. In the Full Name box, type your first and last name.

   This name appears in the From box of an item you send someone. The name is also used as your user folder name.
3. Type your GroupWise user ID.
4. Click Password ▸ type your Master Mailbox password ▸ retype the password ▸ click OK.

   Your Master Mailbox must have a password before you can use Remote.
5. Type the domain name of your Master Mailbox.

**6** Type the post office name of your Master Mailbox.

> **Tips**
>
> - If you have not assigned a password to your Master Mailbox, do so in Security Options while running GroupWise in your office. You cannot use Remote to assign or change your Master Mailbox password. To set a password for your Remote Mailbox only, run GroupWise against your Remote Mailbox ▸ click Tools ▸ Options ▸ double-click Security ▸ type the password ▸ type the password again ▸ click OK.

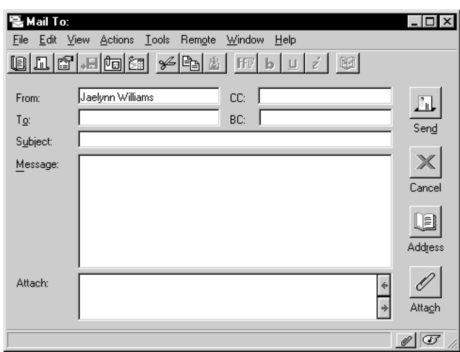
# Sending and Retrieving Items in Remote

Use Send/Retrieve to exchange items and information between your Master Mailbox and your Remote Mailbox.

When you connect to your master GroupWise system, items you sent from your Remote Mailbox are delivered to the recipients. Remote also sends a request to your Master Mailbox to retrieve your items, such as mail. Your master GroupWise system processes the request, then sends your items to your Remote Mailbox, restricting the items according to the limits you set in the Retrieve Options dialog box. In addition to mail, you can retrieve appointments, tasks, notes, rules, documents, and address books.

## Sending Mail from Your Remote Mailbox

**1** On the toolbar, click .



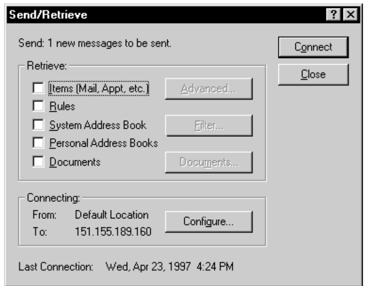

**2** In the To text box, type the recipient names.

You can also use the Address Book to select recipient names.

**3** Type the subject and the message ▸ click Send.

Remote places the mail in the Pending Requests list. When you connect to your master GroupWise system, all items in the Pending Requests list are sent. For more information, see *Viewing Pending Requests* later in this section.

4 To send this mail message and any other pending requests, click Remote ▸ Send/Retrieve.




5 To specify where you're dialing from, click Configure ▸ the Connecting From drop-down list ▸ the remote location.

6 To select a connection to your Master Mailbox, click the Connecting To drop-down list ▸ the modem, network, or TCP/IP connection to your Master Mailbox ▸ click OK.

7 Click Connect.

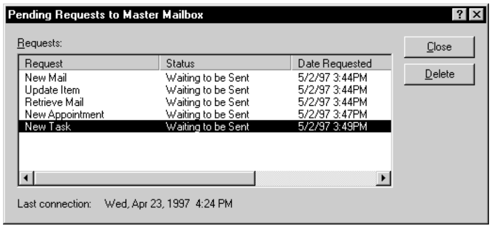
**Tips**

- Besides mail, you can send other items, including appointments, notes, and so on.

## Viewing Pending Requests

Whenever you perform an action that requires information to be sent from your Remote Mailbox to your Master Mailbox, Remote creates a request that is placed in the Pending Requests list. When you connect to your master GroupWise system, all the requests are sent to your Master Mailbox. Use Pending Requests to check for outstanding requests.

1 Click Remote ▸ Pending Requests.




**Tips**

- To prevent a request from being processed, click the request ▸ Delete. Only requests that haven't been sent to the master GroupWise system and have the "Waiting to be Sent" status can be deleted. If you've already sent a request to the master GroupWise system, you cannot cancel the request.

## Retrieving Items from Your Master Mailbox

1 If you're away from your office and run GroupWise against your Remote Mailbox, click Remote ▸ Send/Retrieve ▸ Advanced.

*or*

If you're in your office and run GroupWise against your Master Mailbox, click Tools ▸ Hit the Road ▸ type your Master Mailbox password ▸ click OK ▸ Advanced.

2 To specify the items to retrieve, click the appropriate options from the Items, Date Range, Size Limits, and Folders tabs ▸ click OK.

3 To retrieve specific items, click Filter ▸ specify your retrieval criteria ▸ click OK.

4 To specify where you're dialing from, click Configure ▸ the Connecting From drop-down list ▸ the remote location.

5 To select a connection to your Master Mailbox, click the Connecting To drop-down list ▸ click the modem, TCP/IP, or network connection to your Master Mailbox ▸ click OK.

6 Click Connect.

**Tips**

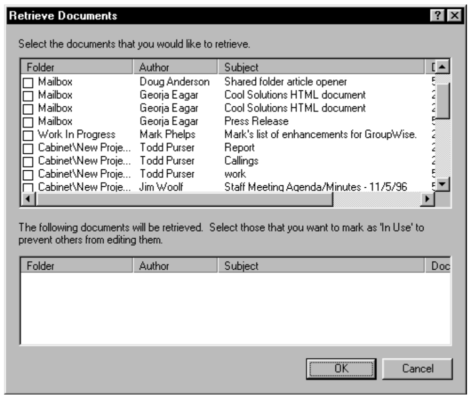
- By default, GroupWise transfers all document references in your Master Mailbox to your Remote Mailbox. If you don't want the document references, click the Documents pop-up list ▸ None.

### Retrieving Documents into Your Remote Mailbox

1 If you're away from your office and run GroupWise against your Remote Mailbox, click Remote ▸ Send/Retrieve ▸ the Documents check box ▸ Documents.

*or*

If you're in your office and run GroupWise against your Master Mailbox, click Tools ▸ Hit the Road ▸ type your Master Mailbox password ▸ click OK ▸ the Documents check box ▸ Documents.




2 Click the documents you want in the top list box.

3 As selected documents appear in the bottom list box, click the documents you want to edit to mark them as In Use ▸ OK.

**Tips**

- Mark a document as In Use only if you want to prevent other users from modifying it. To clear the In Use status of a document, click Yes when you are prompted to send the document to the Master Library and mark it as Available.
- If a document is deleted in the Master Library while you are using Remote, it is deleted from your Remote Mailbox the next time you connect to your master GroupWise system.

## Limiting the Items You Retrieve

You can save time and disk space by restricting the items you retrieve from your Master Mailbox. You can retrieve items of a specific size or from a specific folder. In addition, you can retrieve just the subject line of items so you can review an item before you retrieve it in its entirety.

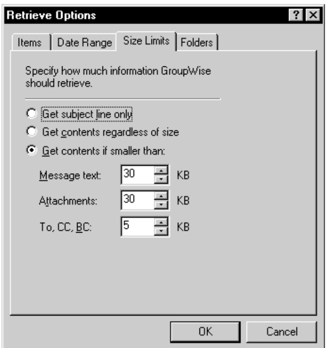
### Retrieving Items of a Specific Size Only

1. If you're away from your office and run GroupWise against your Remote Mailbox, click Remote ▸ Send/Retrieve ▸ Advanced.

   *or*

   If you're in your office and run GroupWise against your Master Mailbox, click Tools ▸ Hit the Road ▸ type your Master Mailbox password ▸ click OK ▸ Advanced.

2. Click the Size Limits tab.




3. Click Get Contents If Smaller Than.

4. Specify the size limits (in kilobytes) for the message text, attachments, and the addressing fields.

**Tips**

- If you retrieve an item that exceeds one of the size limits, the part of the item that exceeds the limits will not be retrieved. For example, if an attachment exceeds the size limit, only the message text and addressing field information will be retrieved.

### Retrieving the Subject Line Only of Items

1 If you're away from your office and run GroupWise against your Remote Mailbox, click Remote ▸ Send/Retrieve ▸ Advanced.

   *or*

   If you're in your office and run GroupWise against your Master Mailbox, click Tools ▸ Hit the Road ▸ type your Master Mailbox password ▸ click OK ▸ Advanced.

2 Click the Size Limits tab ▸ Get Subject Line Only ▸ OK.

### Retrieving Items from Specific Folders

1 If you're away from your office and run GroupWise against your Remote Mailbox, click Remote ▸ Send/Retrieve ▸ Advanced.

   *or*

   If you're in your office and run GroupWise against your Master Mailbox, click Tools ▸ Hit the Road ▸ type your Master Mailbox password ▸ click OK ▸ Advanced.

2 Click the Folders tab ▸ the folders ▸ OK.

   A check mark indicates a folder is selected. To select items from all folders, leave all the folders unselected.

## Retrieving Selected Items

If you use the Get Subject Line Only and Get Contents If Smaller Than options to retrieve items from your Master Mailbox, you can scan the retrieved items and decide which ones to retrieve in their entirety. Use Retrieve Selected Items to retrieve the rest of a selected item, including the entire message and any attachments, regardless of previous size and filter criteria.

1 Select the items in your Remote Mailbox.

2 Click Remote ▸ Retrieve Selected Items.

3 To connect immediately to your Master Mailbox, click Connect Now.

*or*

To create the request but not send it, click Connect Later. This way, you can wait until you have several requests and connect later.

**Tips**

- To retrieve an item, you can also right-click the item ▸ click Retrieve Selected Items.

## Retrieving a Personal Address Book

1 If you're away from your office and run GroupWise against your Remote Mailbox, click Remote ▸ Send/Retrieve.

*or*

If you're in your office and run GroupWise against your Master Mailbox, click Tools ▸ Hit the Road ▸ type your Master Mailbox password ▸ click OK.

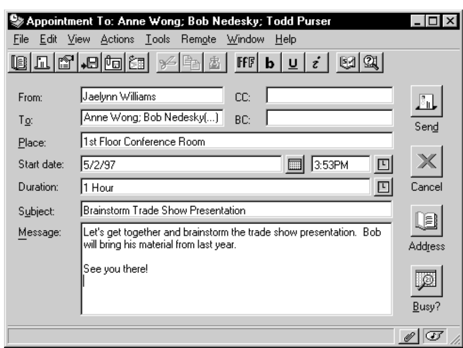
2 Click Personal Address Books ▸ Connect.

**Tips**

- Because retrieving an address book can take a long time, we recommend retrieving it through a network or TCP/IP connection while you're at your office.

## Using Busy Search in Remote

1 On the toolbar, click .

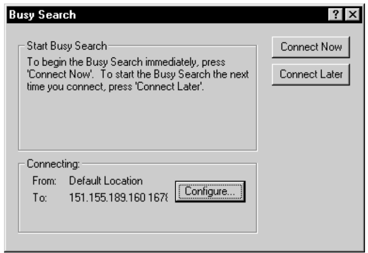



2 To select the participants and resources for the meeting, click Address.

If you're typing several user and resource IDs in the To box, press Enter between entries.

3 To select the first possible meeting day, click  ▸ a date.

4 Click Busy?




5 To immediately connect to your master GroupWise system and search for available times, click Connect Now.

*or*

To search for available times later, click Connect Later.

Clicking Connect Later creates a Busy Search request, but doesn't send the request to the master GroupWise system. You can save your appointment as a draft item in the Work In Progress folder until you are ready to send it. When you're ready to check appointment times later, click Busy? ▸ Update Now.

6 When the Choose Appointment Time window appears, click Auto-Select for the first available meeting time. Click Auto-Select until the best available time is displayed ▸ click OK.

*or*

Instead of using Auto-Select, click the Available Times tab ▸ an available time ▸ OK.

7 Complete the appointment ▸ click Send.

**Tips**

- If you're disconnected before all schedule information returns from a Busy Search, clicking Busy? again lets you update the information from the original Busy Search request.
- To remove a user or resource from the Invite To Meeting list after the search, click the Available Times tab ▸ the user or resource ▸ press the Delete key.
- To specify where you're dialing from, click Configure ▸ the Connecting From drop-down list ▸ the remote location ▸ OK.
- To select a connection to your Master Mailbox, click Configure ▸ the Connecting To drop-down list ▸ the modem, TCP/IP, or network connection to your Master Mailbox ▸ OK.

## Filtering the System Address Book for Your Remote Mailbox

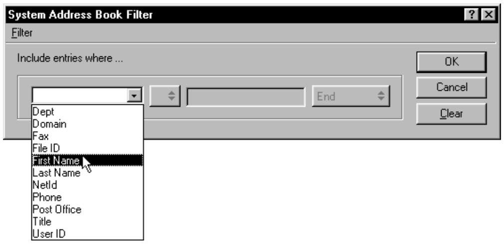
The system Address Book is usually large, because it contains information for your entire organization. If you don't need all the information in the system Address Book when using GroupWise away from your office, use System Address Book Filter to retrieve only the user addresses, resource addresses, and public groups you need from the GroupWise system.

For example, the filter statement, Dept [] Marketing, instructs GroupWise to retrieve all addresses with "Marketing" in the Department column in the Address Book. This way you can contact anyone from your Marketing department while you're traveling.

1 Before leaving your office, click Tools ▸ Hit the Road.

2 If you're prompted for a password, type your Mailbox password ▸ click OK.

3 Click System Address Book ▸ Filter.




4 Click an Address Book column in the first drop-down list.

   For example, click Dept to search for addresses from a specific department.

5 Click the operator pop-up list ▸ click an operator ▸ type your search criteria in the text box or click a value, if provided.

   For example, click [] ▸ type Accounts to search for addresses from the Accounts department. Your search criteria, such as a person's name or a subject, can include wildcard characters such as an asterisk (*) or a question mark (?) Filter is not case-sensitive to the criteria you type.

6 To add more filter conditions, click the last pop-up list ▸ And.

7 After specifying all filter conditions, click OK.

**8** Read the text beginning with “Include entries where...” as you create your filter. This summarizes how your filter will work.

**Tips**

- To filter the system Address Book while you’re away from the office, click Remote ▸ Send/Retrieve and follow Steps 3 to 7.
- For more information on operators see *Filtering* under *Finding Items in Your Mailbox*.

## Deleting Items in Your Remote Mailbox

Use Delete and Empty Trash to remove items from your Mailbox and to free up disk space. If you sent an item with old or wrong information, or you need to reschedule an appointment, use Delete to retract that obsolete item from the recipients’ Mailboxes.You can retract mail and phone messages from the Mailboxes of those recipients who haven’t opened them. Appointments, notes, and tasks can be retracted at any time.

The next time you connect to your master GroupWise system, the changes in your Remote and Master Mailboxes will automatically synchronize.

**1** Click the item in your Mailbox.

**2** Click Edit ▸ Delete.

**3** If you’re deleting an outgoing item, click one of the available options.

**4** To free up disk space, click Edit ▸ Empty Trash.

This permanently removes all deleted items from your Remote Mailbox.

**5** To synchronize your Remote and Master Mailboxes, connect to your master GroupWise system.

**Tips**

- You can save time by waiting until you have several send and retrieve requests before you connect to your Master Mailbox.

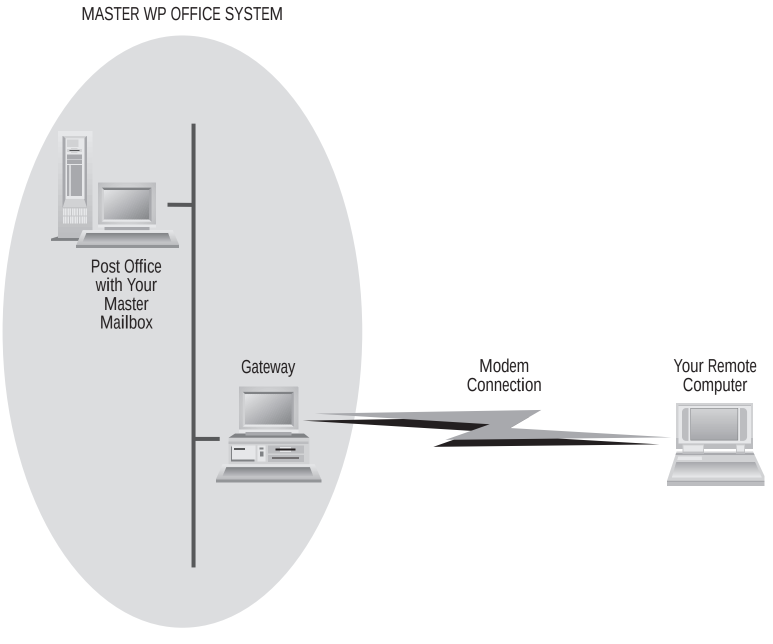
# Configuring Your Remote Connections

To access your Master Mailbox to send or retrieve information, you must connect to your master GroupWise system through a modem connection, a network connection, or a TCP/IP connection. When you use Hit the Road to set up your Remote Mailbox, GroupWise creates the appropriate connections based on how you are currently running GroupWise.

For example, if you use a drive mapping to connect to your GroupWise post office, GroupWise creates a network connection and the modem connections for all asynchronous gateways detected in your master GroupWise system. If you're running GroupWise in client/server mode, GroupWise creates a TCP/IP connection instead of a network connection. You can create new connections as well as change or delete existing ones. When creating a new connection, you can copy an existing connection, then edit the duplicated settings to create the new connection without redoing every setting.

### Modem Connections

In most cases, you will use a modem to connect to your master GroupWise system via a gateway when you are away from the office.




Your modem uses the information from the Connection Configuration dialog box to connect to your Master Mailbox.

A modem connection is similar to a phone call. You need the telephone number of your master GroupWise system that is part of the Connect To information. Other

Connect To information includes the ID and password of the gateway you're connecting to.

As in a phone call, dialing prefixes may change when you connect from a different location. For example, when you're at a hotel, you often need to dial 9 to access an outside line. If you're at home, you don't need this prefix. You'll need to set up the dialing information for each remote location. After setting up the dialing properties for your remote locations, use Connect From in the Connection Configuration dialog box to select a remote location when connecting to your Master Mailbox. For more information about setting dialing properties for each remote location, see your Windows documentation.

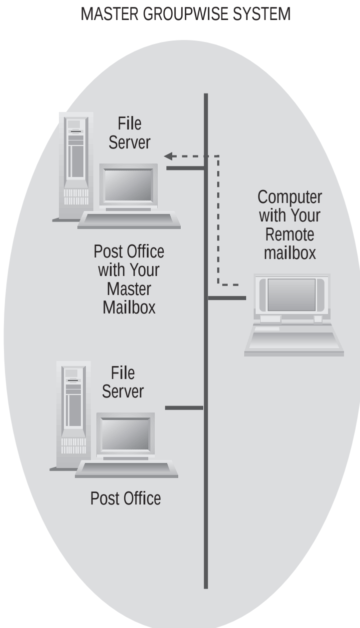
#### TCP/IP Connections

TCP/IP connections use an IP (Internet Protocol) address and port to connect to your master GroupWise system.

If you use an Internet provider while you are away from the office, you can avoid phone charges by using a TCP/IP connection. In addition, you don't need to exit an Internet connection and hang up the phone to connect to your master GroupWise system via a modem connection. You can use the same Internet connection to connect to your master GroupWise system. If you're connected to your Master Mailbox in client/server mode and use Hit the Road to set up your Remote Mailbox, GroupWise detects the IP information and uses it to create a TCP/IP connection for you. If you need the IP information, check with your system administrator.

### Network Connections

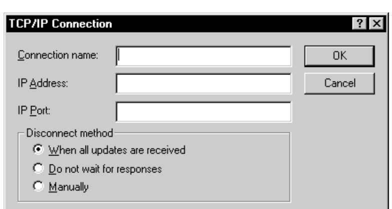
When you're at the office, you can run GroupWise against your Remote Mailbox and connect to your master GroupWise system through the network.




A network connection is useful for retrieving large amounts of information, such as your system Address Book, because it transfers information faster than a modem connection and saves long-distance phone charges.

## Creating a TCP/IP Connection

1. Click Tools ▸ Options ▸ double-click Remote.
2. Click Connections ▸ Connect To ▸ New.
3. Click TCP/IP ▸ OK.




4. Type a descriptive name for the TCP/IP connection.
5. Type the IP address and port information provided by your system administrator.

Instead of an IP address, you can also type the DNS host name in the IP Address box. Check with your system administrator.

6 Click a disconnection method ▸ OK ▸ Close.

**Tips**

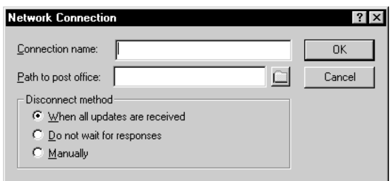
- You can also click Remote ▸ Send/Retrieve ▸ Configure to create a TCP/IP connection.

## Creating a Network Connection

1 Click Tools ▸ Options ▸ double-click Remote.

2 Click Connections ▸ Connect To ▸ New.

3 Click Network ▸ OK.




4 Type a descriptive name for the network connection.

5 Type the path to any post office directory in your master GroupWise system.

Contact your system administrator for the path to your post office. You can also connect to any post office in your master GroupWise system to access your Master Mailbox. You don't need to connect to the post office containing your Master Mailbox.

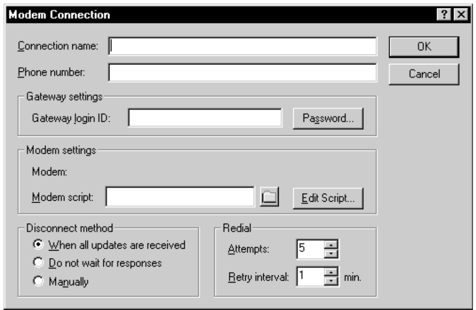
6 Click a disconnection method ▸ OK ▸ Close.

## Creating a Modem Connection

1 Click Tools ▸ Options ▸ double-click Remote.

2 Click Connections ▸ Connect To ▸ New.

3 Make sure Modem is selected ▸ click OK.




4 In the Connection Name box, type a description.

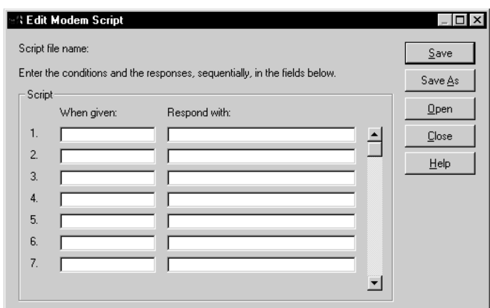
For Steps 5, 6, and 7 below, contact your system administrator for your gateway's phone number, login ID, and password.

5 Type the phone number for the gateway to your master GroupWise system.

6 Type the login ID for the gateway.

7 Click Password ▸ type the gateway password ▸ click OK ▸ retype the password ▸ click OK.

8 If your modem requires a script, click Edit Script.




9 Specify the necessary When Given and Respond With commands.

10 To save the script without changing its filename, click Save.
*or*
To save the script with a new filename, click Save As.

11 Click a disconnection method.

12 Click Attempts ▸ specify the number of times to redial if the line is busy.

13 Click Retry Interval ▸ specify the time interval between each redial attempt.

14 Click OK ▸ Close.

**Tips**

- If your modem requires a script to access your Master Mailbox, contact your system administrator. To retrieve an existing script file, click ▸ select the script file ▸ click Open.

---

**Copying a Modem, Network, or TCP/IP Connection**

1. Click Tools ▸ Options ▸ double-click Remote.
2. Click Connections ▸ Connect To ▸ a connection ▸ Copy.
3. Modify the connection ▸ click OK.

**Tips**

- Instead of Steps 1 and 2, you can also click Remote ▸ Send/Retrieve ▸ Configure ▸ Connect To ▸ a connection ▸ Copy.

---

**Editing a Modem, Network, or TCP/IP Connection**

1. Click Tools ▸ Options ▸ double-click Remote.
2. Click Connections ▸ Connect To ▸ the connection ▸ Edit.
3. Make the necessary changes ▸ click OK.

**Tips**

- Instead of Steps 1 and 2, you can also click Remote ▸ Send/Retrieve ▸ Configure ▸ Connect To ▸ the connection ▸ Edit.

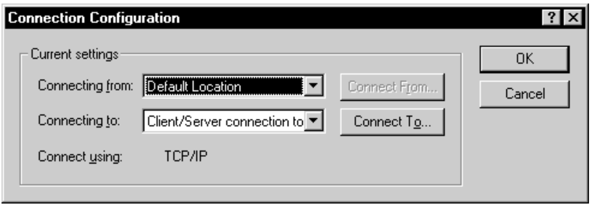
---

**Deleting a Modem, Network, or TCP/IP Connection**

1. Click Tools ▸ Options ▸ double-click Remote.
2. Click Connections ▸ Connect To ▸ the connection.
3. Click Delete ▸ Yes.

## Specifying Your Remote Location

1 Click Tools ▸ Options double-click Remote ▸ click Connections.




2 To select your remote location, click the Connect From drop-down list ▸ the remote location.

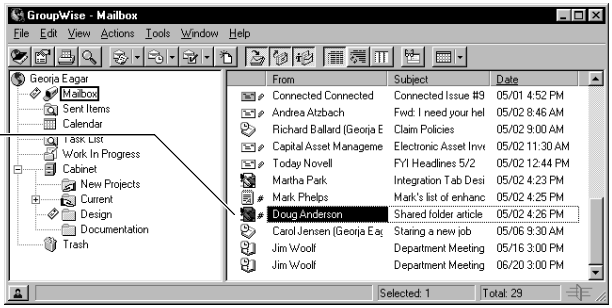
3 To change the dialing properties of your modem, click Connect From ▸ specify changes in the Dialing Properties dialog box ▸ click OK.

# Creating and Working with Documents

# Managing Your Documents in GroupWise

GroupWise® Library lets you manage all your documents, whether they are reports or program files, from your Mailbox.

In GroupWise, your documents display as items in your Mailbox and folders along with all your other mail messages, tasks, appointments, and so on.




*Double-click the document reference to open the document. The document icon shows which application the document was created in.*

You can select a document reference to create, delete, check out, check in, or copy the corresponding document.

In addition, GroupWise Library makes it easy to maintain multiple versions of a document, determine who has access to a document, and share a document with others.

## Storing Documents in Libraries

In GroupWise, all of your documents are stored in a library. GroupWise assigns a unique number to each document. This number identifies the document and makes it easy to find. You can look up a document in the GroupWise Library by its document number much like you can look up a book in a library by its catalog number.

In each library, the documents are compressed and encrypted. This saves disk space and maintains the security of documents because it makes it impossible to view the contents of documents outside of GroupWise.

Before you can access any of the documents in a library, you must first have rights to the library. Your system administrator determines which people have access to each library.

Once you have imported or created a document in the GroupWise Library, you can only access that document within GroupWise. This keeps your documents secure. If you need to share the document with a user who does not have access to GroupWise, you can click File ▸ Save As to save the document in an external file, outside the GroupWise Library. This file is not updated with any changes made to the document in GroupWise and is not controlled by the sharing rights assigned in GroupWise.

## Understanding Document References

The document items that display in your Mailbox (and other folders) are called document references. These document references are links to the actual documents in the library.


Document references are created when you create a new document, import a document, copy a document, select a document from the results of a Find, or select File ▸ New ▸ Document Reference.

You can select a reference to check out, check in, open, view, copy, or delete the corresponding document. Multiple document references can point to the same document. For example, each employee in a company could create a reference to the employee handbook.

### Sharing Document References with Other Users

If you are the author of a document or if you have share rights to the document, you can post the document reference in a shared folder and make it available to all users who have access to the folder. In addition, you can forward the document reference and attach the document reference to mail messages.

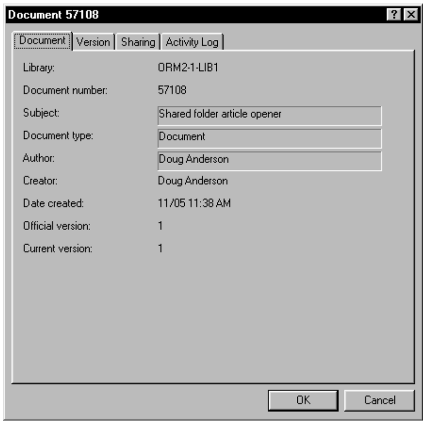
### Document References and Remote

If you use Remote, updating your Remote Mailbox always gives you all of the document references, unless you choose to have none. You can use the document references to retrieve copies of the documents into your Remote Mailbox.

## Specifying Document Properties

Every document in GroupWise must have a set of attributes associated with it, such as the author's name, the creation date, and the document type. These attributes are called Document Properties. The document property information is used for finding and categorizing documents.

You can use the Document tab in Properties to view version information for the specific version of a document, view the document activity history, and control sharing of the document with other users.




You can determine which fields display on the Document tab in Properties and customize their size and order using the options in the Library Setup Properties dialog box. To open this dialog box, click Tools ▸ Options ▸ double-click Documents ▸ click Properties.

# Creating Documents

When you create a document in GroupWise, you are adding a document to the Library. You can also add documents to the Library by importing, copying, or checking in an existing document.

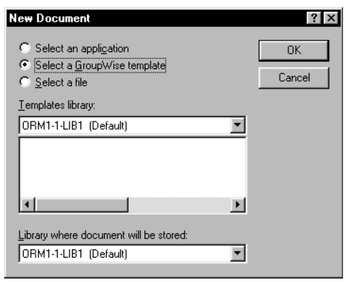
When you create a new document using File ▸ New ▸ Document, GroupWise prompts you to select a template for the document. You can use an application's template, a GroupWise template, or a file on disk as the foundation for your new document.

| | |
|---|---|
| Application Templates | You can select an application to create a document based on the application's template file. The Applications list box lists all the applications that are registered as having templates in your Windows® registry file. |

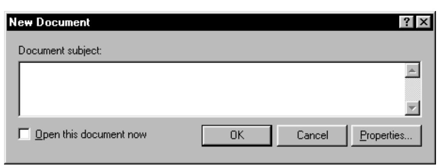
| | |
|---|---|
| GroupWise Templates | You can select GroupWise templates to use a document in the Library as the foundation of a new document. You can store documents (such as memos or expense reports) in GroupWise and assign them a document type of template. All the documents in the Library with a document type of template (that you have rights to) appear in the Templates Library list. |
| Files as Templates | File templates are documents that are not in the Library. You can select a file anywhere on your system and use it as a foundation for a new document. |

## Creating a Document Using a GroupWise Template

1. Click File ▸ New ▸ Document.
2. Click Select a GroupWise Template ▸ select a template in the list box.




3. To select a template from a different library, click the library in the drop-down list.
4. Click OK.




5. Type the subject of the document.

   To specify additional information about the document, such as author name or document type, click Properties after you type the subject, then click OK.
6. Click OK.

7 Double-click the document reference in the current folder to open the new document.

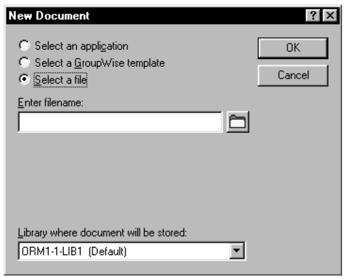
**Tips**

- You can click Open Document Now to immediately open the document.

## Creating a Document Using a File as a Template

1 Click File ▸ New ▸ Document.

2 Click Select a File.




3 Type the name of the file you want to use as a template for the new document.

You can also click the Browse button to find the file.

4 Click OK.

5 Type a subject.

To specify additional information about the document, such as author name or document type, click Properties after you type the subject, then click OK.

6 Click OK.

## Creating a Document Using an Application's Template

1 Click File ▸ New ▸ Document.

2 Click Select an Application ▸ click the application you want to use as a template in the Applications list box ▸ click OK.

3 Type a subject for the document.

To specify additional information about the document, such as author or document type, click Properties after you type the subject, then click OK.

4 Click OK.

**Tips**

- The Applications list box contains all the applications that are registered as having templates in your Windows registry file.

## Marking a Document in GroupWise as a Document Template

1. Click the document reference in your Mailbox.
2. Click File ▸ Properties.
3. In the Document Type text box, type template ▸ click OK.

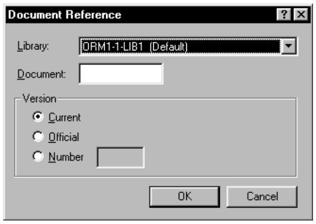
**Tips**

- With a document type of Template, the document will display in the New Documents dialog box, and you can select the document as a foundation for new documents.

## Creating a Reference to a Document

If a document already exists in the Library, you just create a reference for it in your Mailbox.

1. Click File ▸ New ▸ Document Reference.




2. Specify the library that contains the document you want to access.
3. Type the document number.
4. In the Version group box, click the version you want the document reference to access.
5. Click OK.

**Tips**

- If you don't know the number of the document, use Find to locate the document. To add the document displayed in the Find results to your Mailbox, click the document ▸ Edit ▸ Move/Link to Folder.
- You can also use Find to locate a document and then drag the document to your Mailbox or folder.

# Importing Documents into a GroupWise Library

You can import documents created outside of GroupWise into GroupWise Library. By default, GroupWise performs a Quick Import and copies the documents you specify into your default library. If you want to have more control over how your documents are imported, click the Quick Import check box to deselect it. This lets you perform a custom import.

When you perform a custom import you can specify the following information:

- Whether you want to copy or move the documents into the library.
- The filename and location of a log file for import status messages and errors.
- The library where you want to store the documents.
- Whether or not you want to create document references in a folder. If you create document references, you can specify the folder in which to store them.
- Whether you want to specify document properties for each document individually or have GroupWise create document properties using the default values.
- Whether or not the current filenames will be used as part of the document subject.

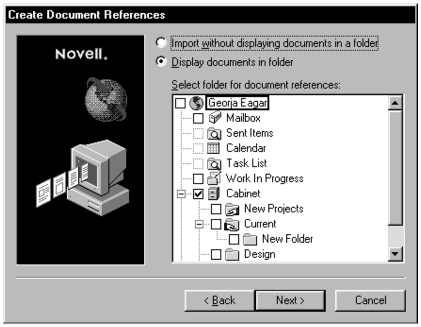
## Importing Documents Using Quick Import

**1** Click File ▸ Import Documents.


**2** Click Add Files ▸ select the files you want to import ▸ click OK.

To select multiple files to import, press Ctrl while you click each additional document.

3 Click **Next**.




4 If you want GroupWise to create document references for each document, click **Display Documents in Folder** ▸ click the folder where you want to store them.

*or*

If you do not want to create document references, click **Import Without Displaying Documents in a Folder**.

5 Click **Finish** to begin the import.

GroupWise copies the documents into the specified library and creates a document reference for each document in the Cabinet folder.

**Tips**

- You can also import a document by dragging it from a window or your desktop to a GroupWise folder.
- To remove a file from the Files to Import list, click the file ▸ click **Remove Files**.

## Importing Documents Using Custom Import

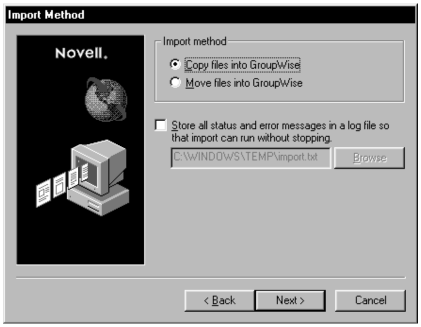
1 Click **File** ▸ **Import Documents**.

2 Click **Add Files** ▸ select the files you want to import ▸ click **OK**.

To select multiple files to import, press **Ctrl** while you click each additional document.

3 Make sure **Quick Import** is not selected.

4 Click Next.



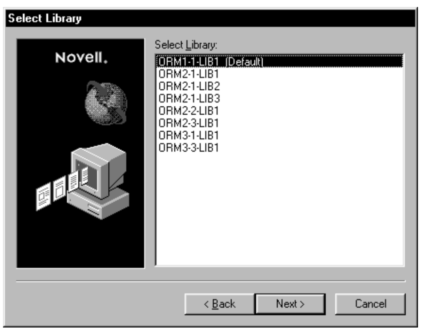

5 Click Copy Files into GroupWise to place a copy of the files in the library and leave the original files in the source location.

*or*

Click Move Files into GroupWise to move the files into the library and delete the original files from the source location.

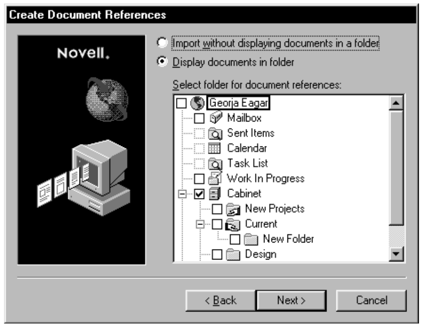
6 To save any import errors in a log file, click Store All Status and Error Messages in a Log File ▸ specify a filename.

7 Click Next.




8 Click the library you want to store the documents in.

**9** Click Next.

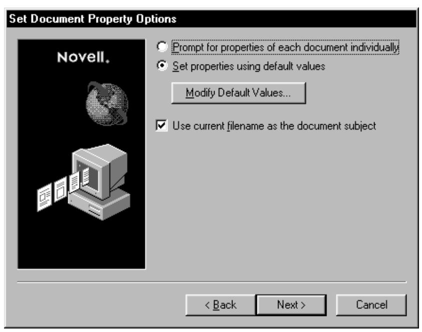



**10** If you want GroupWise to create document references for each document, click Display Documents in Folder ▸ click the folder where you want to store them.

*or*

If you do not want to create document references, click Import Without Displaying Documents in a Folder.

**11** Click Next.




**12** To specify properties for each document you are importing, click Prompt for Properties of Each Document Individually.

*or*

To have GroupWise specify properties based on the default property values specified in Document options, click Set Properties Using Default Values.

**13** If you want to specify different default values for this import session only, click Modify Default Values ▸ specify the values ▸ click OK.

**14** Click Next.

**15** Click Finish to begin the import.

# Integrating GroupWise with Your Applications

If you are using an integrated application, such as WordPerfect® 7, Word 7, Excel™ or Word Pro™, you can integrate the application's Open and Save features with GroupWise. When you integrate an application, you can access the documents in your Mailbox and folders when you select Open in the application. In addition, you can save any changes you make to the document as a new version using the application's Save As feature.

GroupWise can integrate with applications one of two ways: through the ODMA component supplied by the application or through a point-to-point integration macro provided by GroupWise.

## Integrating Applications During Setup

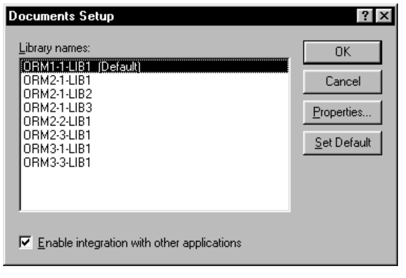
If Setup detects that you have WordPerfect 7, Word 7, or Excel properly installed, it prompts you to specify whether you want GroupWise to integrate with the application. By default, Setup will integrate WordPro. If you integrate your applications and later want to disable the integration, you can turn off the integration in Document Setup Properties.

## Using Non-integrated Applications

If you are using non-integrated applications (All Windows 3.1 applications, MS DOS applications, and many Windows 95™ applications), you can't integrate GroupWise with your application.

## Turning Off GroupWise Integration

**1** Click Tools ▸ Options ▸ double-click Documents.




**2** Click Enable Integration with Other Applications.

**Tips**

- To integrate your applications with GroupWise, you must select the applications you want to integrate during Setup. For more information, contact your system administrator.

# Storing Multiple Versions of a Document

You can store multiple versions of a document in GroupWise. Each document reference in your Mailbox points to a single document version. You can view information about a specific version of a document in the Version tab in Properties. You can manage (open, check out, check in, and so forth) document versions in the Version List dialog box. There are three categories of document versions in GroupWise:

**Current Version**
The most recent revision of the document.

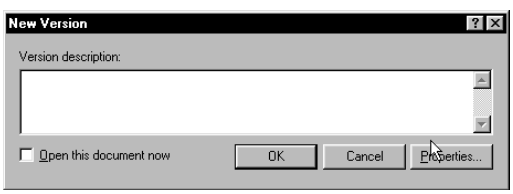
**Official Version**
The version you designate as official. When you designate an official version, you can grant users different access rights to the official version than you grant them to all other versions of the document. For example, you can grant all users rights to view the official version of the employee handbook, but grant only yourself rights to view and edit all other versions of the handbook. If you do not specify an official version of the document, the current version is considered to be the official version. In the Item List, a star displays next to the document reference for the official version.

**Specific Version**
A version of a document that is referenced directly by its version number. In the Item List, the number symbol (#) displays next to the document reference. You can grant different access rights for each version of the document. For example, you can grant all users on your system view rights to the official version and grant specific users view rights to the current version.

## Creating a New Version of a Document

1 In your Mailbox, click the document reference for the document you want to create a new version of.

2 Click File ▸ New ▸ Document Version.




3 Type a description for this version of the document ▸ click OK.

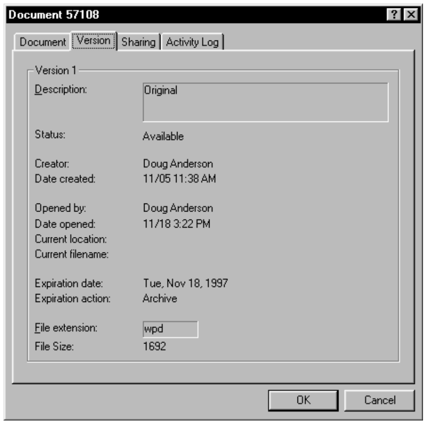
**Tips**

- The selected version and its properties are copied to a new version.

## Viewing Version Information for a Document

1 Click the document reference in your Mailbox.

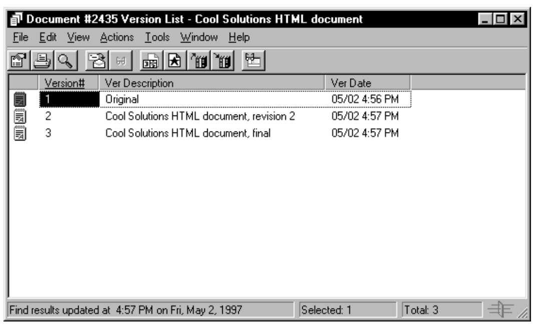
2 Click File ▸ Properties ▸ Version.




## Specifying the Official Version of a Document

1 Click the document reference in your Mailbox.

2 Click Actions ▸ Version List.




3 Click the version you want to mark official.

4 Click Actions ▸ Mark Official Version.

**Tips**

- To set the official version, you must have rights to modify security settings and the system administrator must have given you rights to set the official version of a document.

# Sharing Documents

When you create or import a document in GroupWise you can specify whether you want to share the document with other users. If you share a document, you can specify which users or group you want to share the document with and what rights each user will have.

When you create a new document, GroupWise inserts <General User> and <Creator> in the Sharing list. By default, general users (all users with access to the Library) do not have any rights to the document and the author and creator have full rights to the document. You can use the <General User> entry to grant the same rights to all users who have access to the Library, and you can use the <Creator> entry to limit the rights of the creator.

## Specifying Users Who Can Share the Document

You can use the options on the Sharing tab in Properties to give sharing rights to a document. You can use one of the following methods to give sharing rights:

- You can click Not Shared to prevent other users from viewing, editing, or deleting the document.
- You can click Shared With to select specific users and groups and specify sharing rights for each user or group.

  When a user tries to access a document, GroupWise checks the rights of the individual user. If the user doesn't have rights to the document, GroupWise checks for any rights the user inherits as a member of a group. If the user doesn't have rights to the document as a member of a group, GroupWise checks the rights given to <General User>.
- You can click Shared With and then click Version Level Security to give users different rights for each version of the document.

## Specifying Users' Rights to the Document

You can give users rights to view, edit, delete, or share a document. When you give users rights to share a document, they can put the document in a shared folder, forward the document reference, or attach the document reference to a mail message. You can also give users rights to modify the security settings for a document. To have modify rights, a user must also have edit rights. The rights you specify are for all versions of a document. If you want to specify different rights for each version of a document, click the Version Level Security button.

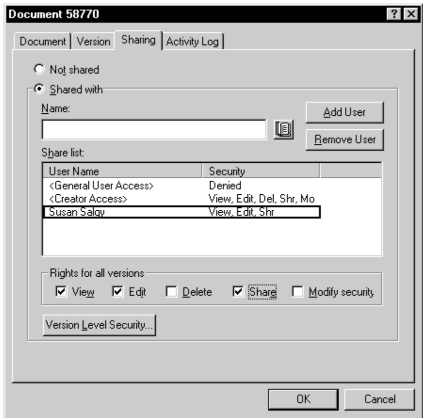
When you grant users edit or delete rights, GroupWise automatically gives them view rights to the document. If users don't have view rights, they can't see the document in the results of a Find.

## Giving a User Rights for All Versions of a Document

1 Click the document reference in your Mailbox.

2 Click File ▸ Properties.

3 Click the Sharing tab.




4 Click Shared With.

5 In the Name text box, type the name of the user or group you want to grant rights to ▸ click Add User.

6 Click the check boxes for the rights you want to grant to the selected user.

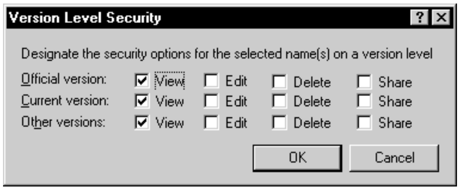
7 Click OK.

**Tips**

- You must be the creator of a document to grant access rights, or the creator of the document must grant you rights to modify security for the document.
- Users must have Share rights to put the document reference in a shared folder, forward the document reference, or attach the document reference to a mail message.

## Giving a User Rights to a Specific Version of a Document

1. Click the document reference in your Mailbox.
2. Click File ▸ Properties.
3. Click the Sharing tab.
4. Click Shared With.
5. In the Name text box, type the name of the user or group you want to grant rights to ▸ click Add User.
6. Click Version Level Security.




7. Click the check box for each right you want the user to have for the version type ▸ click OK.

> **Tips**
> - You must be the creator of a document to grant access rights, or the creator of the document must grant you rights to modify security for the document.
> - Users must have Share rights to put the document reference in a shared folder, forward the document reference, or attach the document reference to a mail message.

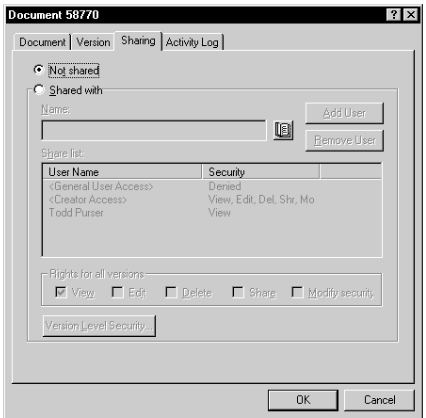
## Giving Users Rights to Modify the Sharing Settings for a Document

1. Click the document reference in your Mailbox.
2. Click File ▸ Properties.
3. Click the Sharing tab.
4. Click Shared With.
5. In the Name text box, type the name of the person or group you want to grant modify rights to ▸ click Add User.
6. Click Modify Security.

> **Tips**
> - You must be the creator of a document to grant rights to modify security settings.

## Preventing Other Users from Accessing Your Document

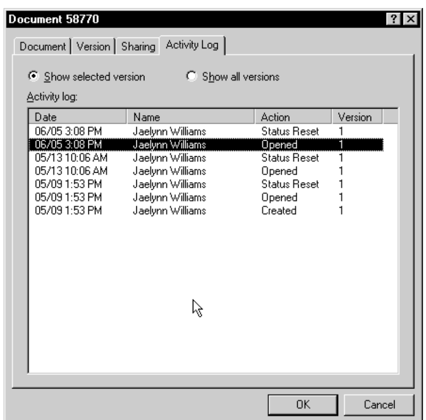
1. Click the document reference in your Mailbox.
2. Click File ▸ Properties.
3. Click the Sharing tab.




4. Click Not Shared.

## Viewing Who Has Opened a Document

1. Click the document reference in your Mailbox.
2. Click File ▸ Properties ▸ Activity Log.



An entry is added each time a document is placed in a shared folder or forwarded to another user.

**Tips**

- To share document references, you must be the creator or author of the document, or the creator or author must have given you Share rights to the document.

# Viewing the History of a Document

You can use the Activity Log to see if a document has been opened, viewed, checked out, and so on. In addition, you can see who has been looking at and using the document. The Activity Log displays the date and time an activity occurred, the name of the user who performed the activity, the type of activity (opened, checked out, deleted, shared, and so forth) and the document version affected by the activity.

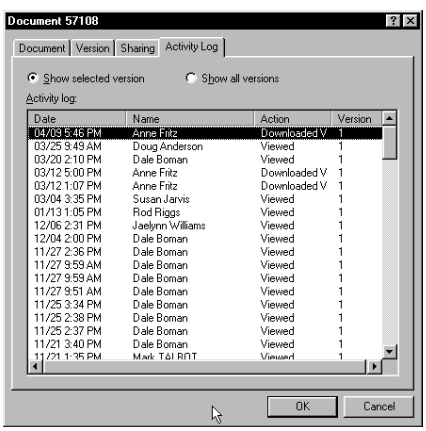
You can display the activities associated with the selected version of a document, or you can display the activities associated with all versions of a document. The most recent document activities display at the beginning of the list.

## Viewing the Activity of a Document

1 Click the document reference in your Mailbox.

2 Click File ▸ Properties.

3 Click the Activity Log tab.




The activities that have taken place with the version (check out, check in, and so forth) display in the list box.

### Checking Who Has a Document Open or Checked Out

1. Click the document reference in your Mailbox.
2. Click File ▸ Properties.
3. Click the Activity Log tab to view who has the document open or checked out.

**Tips**

- You can also view who has a document open on the Version tab. To do so, click the document reference ▸ File ▸ Properties ▸ Version.
- To view document activity, you must have view rights for the selected document version.

# Checking Out Documents

Use Check Out when you want to lock the documents you are working on for extended periods of time. For example, you can use Check Out to lock documents you want to work on when you are at home or away from the office.

When a document is checked out, it is locked in the library and other users can't modify it; however, they can view it if they have view rights. GroupWise copies the document to the check-out location you specify. The document remains locked in the library until you check it back in.

IMPORTANT: You don't need to use Check Out to lock a file every time you edit it. When you open a document, GroupWise marks the document as In Use, and it can't be edited by other users until you close it.

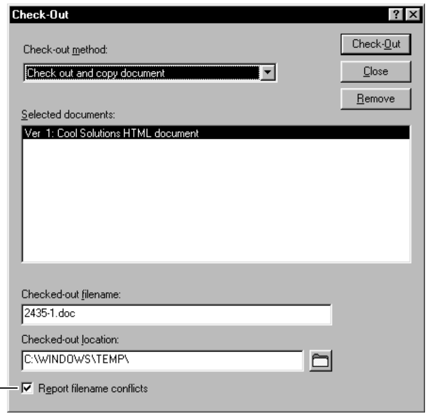
You can select one or more documents to check out in the Main Window, and you can specify a different filename for each document you check out.

### Checking Out a Document

1. In your Mailbox, click the document reference for the document you want to check out.

2 Click Actions ▸ Check Out.

*Click Report Filename Conflicts if you want GroupWise to warn you if another file in the check-out location has the same filename.*




3 In the Checked-Out Filename text box, type a filename for the document.

By default, GroupWise inserts the document number as the check-out filename. If you don't specify a different filename, make a note of the numbered filename so you can locate your checked-out document.

4 In the Checked-Out Location text box, type the path to the location where you want to store the checked-out document.

5 Click Check-Out.

**Tips**

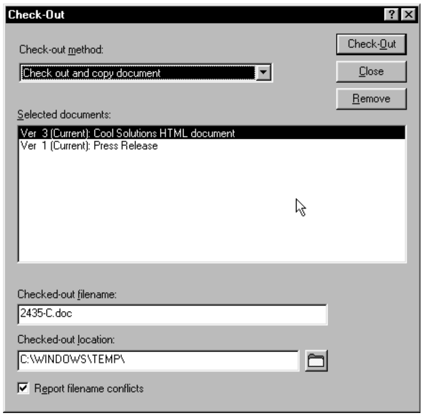
- Users can view the checked-out document in the library if they have view rights.
- Changes you make to the checked-out document do not appear in the document in the library until you check the document back in or update it.
- Other users who have edit rights cannot edit the document while it is checked out.

## Checking Out Multiple Documents

1 In your Mailbox, press Ctrl while you click the document references for the documents you want to check out.

2 Click Actions ▸ Check Out.

3 Click Report Filename Conflicts if you want GroupWise to warn you if another file in the check-out location has the same filename.




4 In the Selected Documents list box, click a document reference.

5 In the Checked-Out Filename text box, specify a check-out filename.

By default, GroupWise inserts the document number, version, and extension as the check-out filename. If you don't specify a different filename, make a note of the filename so you can locate your checked-out document.

6 Repeat Steps 3 and 4 until you have specified check-out filenames for each document.

7 In the Selected Documents list box, press Ctrl and click all the documents you want to check out.

8 Click Check Out.

**Tips**

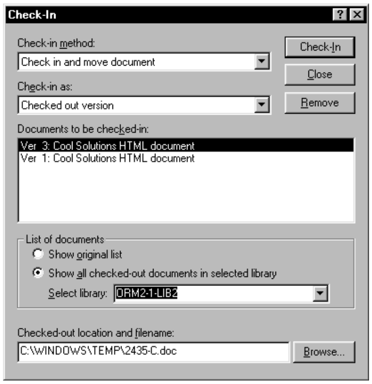
- While the document is checked out, users who have view rights can look at the copy of the document in the library.

## Viewing All the Documents You Have Checked Out

1 Click the document reference in your Mailbox.

2 Click Actions ▸ Check In.

**3** Click Show All Checked-Out Documents in Selected Library.




**Tips**

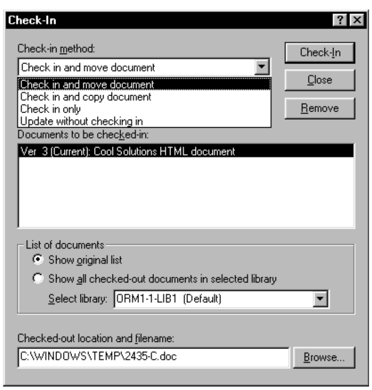
- You can select a different library in the Select Library drop-down list to see the documents you have checked out in that library.

## Updating a Checked-Out Document Without Checking It In

You can have GroupWise update a document in the library with any changes you have made to the checked-out document without checking in the document. Use Update Without Check In if you are still in the process of editing a document but want to allow other users to view the changes you have made.

**1** In your Mailbox, click the document reference for the document you want to update in the library.

**2** Click Actions ▸ Check In.




**3** Click the Check-In Method drop-down list ▸ click Update Without Checking In.

**4** Click Check In.

**Tips**

- To update multiple documents, press Ctrl while you click the document references in your Mailbox.

# Checking In Documents

Use Check In to check in documents you have checked out. When you check in a document, the document is unlocked in the library and other users can modify it.

You can check in individual documents, or you can check in multiple documents. The documents you check in can be in any location.

If one or more checked-out documents are selected when you click Check In, GroupWise displays the selected documents in the Documents to be Checked In list box. If no checked-out documents are selected, GroupWise displays a warning and then displays all the documents you have checked out in the list.

There are four check-in methods:

| | |
|---|---|
| Check In and Move | Moves the document to the library and deletes it from the check-out location. |
| Check In and Copy | Copies the document back to the library and leaves a copy in the check-out location. |
| Check In Only | Checks in the document but does not update the document in the library with any changes you made to the checked-out version. |
| Update Without Checking In | Updates the document in the library with any changes you have made, but does not unlock the document. |

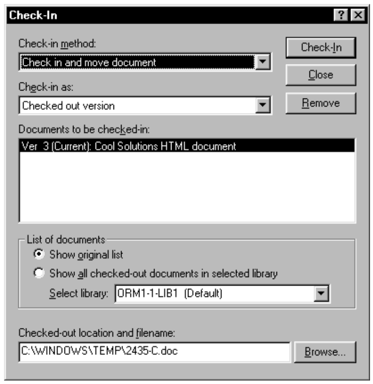
When you check in a document, you can specify which version you want the document checked in as. There are three possible versions:

| | |
|---|---|
| Checked-Out Version | Updates the version of the document that you are checking in. |

| | |
|---|---|
| New Version | Creates a new version of the document. |
| New Document | Creates a document and lets you specify new document properties for it. |

## Checking in a Document and Leaving a Copy in the Check-Out Location

1. Click the document reference in your Mailbox.
2. Click Actions ▸ Check In.




3. Click the Check-In Method drop-down list ▸ click Check In and Copy Document.
4. Click the Check-In As drop-down list ▸ click a version.
5. In the Checked-Out Location and Filename text box, specify the path and filename of the document you are checking in.
6. Click Check-In.

**Tips**

- To check in multiple documents, press Ctrl while you click the documents in the Documents to Be Checked-In list box.
- To remove a document from the Documents to Be Checked-In list, click the document ▸ click Remove.

## Checking in an Unchanged Document

1. Click the document reference in your Mailbox.
2. Click Actions ▸ Check In.
3. Click the Check-In Method drop-down list.
4. Click Check-In Only.

5 Click Check-In.

> **Tips**
> - GroupWise checks in the document without saving changes made while the document was checked out.
> - To check in multiple documents, press Ctrl while selecting the documents in the Documents to Be Checked-In list box.

## Checking in a Document and Deleting It from the Check-Out Location

1. Click the document reference in your Mailbox for the document you want to check in.
2. Click Actions ▸ Check In.
3. Click the Check-In Method drop-down list ▸ click Check In and Move Document.
4. Click the Check-In As drop-down list ▸ click a version.
5. In the Checked-Out Location and Filename text box, specify the path and filename of the document you are checking in.
6. Click Check-In.

> **Tips**
> - To check in multiple documents, press Ctrl while you select the document references in your Mailbox.
> - To remove a document from the Documents to Be Checked-In list, click the document ▸ click Remove.

## Checking In a Document and Making It a New Version

1. In your Mailbox, click the document reference you want to check in and make a new version.
2. Click Actions ▸ Check In.
3. Click the Check-In Method drop-down list ▸ click a check-in method.
4. Click the Check-In As drop-down list ▸ click New Version.

5 In the Checked-Out Location and Filename text box, specify the path and filename of the file you are checking in.

6 Click Check-In.

> **Tips**
>
> - To remove a document from the Documents to Be Checked-In list, click the document ▸ click Remove.

# Deleting Documents

When you delete a document in GroupWise, you can specify whether you want to remove the document reference, the selected version of the document, or all versions of the document. You can delete any document reference in your Mailbox or folders; however, to delete a selected version or all versions of a document, you must have delete rights. See *Sharing Documents* under *Creating and Working with Documents* for more information about document rights.

When you delete the document reference, the reference is removed from your Mailbox or folder, but the document remains in the library. When you delete the document version, the selected version of the document is removed from the library and the reference is removed from the folder. When you delete all versions of the document, all versions of the document are removed from the library and the reference is removed from the folder.

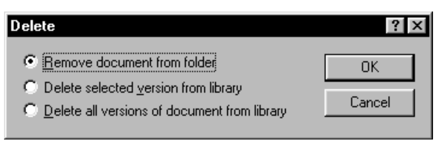
### Deleting Documents According to Document Type

You can delete documents in your folders, or you can let GroupWise automatically delete documents which have exceeded their defined document life. GroupWise removes documents based on the document type assigned to the document on the Document tab in Properties. Each document type has an expiration date and a expiration action associated with it. The system administrator defines the expiration date and action (delete or archive) when he or she creates the library.

## Deleting a Document from Your Mailbox

1 Click the document reference in your Mailbox.

2 Click Edit ▸ Delete.



3 Click Remove Document From Folder ▸ OK.

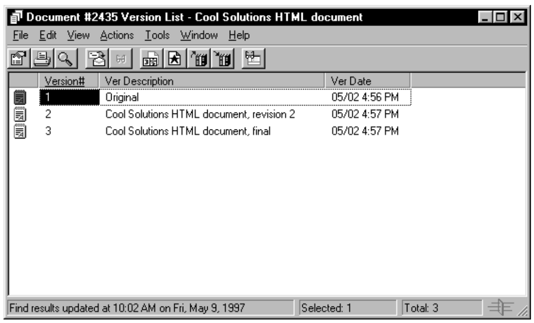
**Tips**

- The document in the library is not deleted, and any users with references to the document can still view, open, edit, or delete it, depending on their rights.

## Deleting a Specific Version of a Document

1 Click the document reference in your Mailbox.

2 Click Actions ▸ Version List.



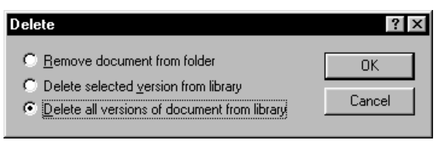

3 Click the version you want to delete.

4 Click Edit ▸ Delete.

## Deleting All Versions of a Document

1 Click the document reference in your Mailbox.

2 Click Edit ▸ Delete.




3 Click Delete All Versions of Document from Library ▸ click OK.

**Tips**

- You can click Remove Document from Folder to remove a document reference without deleting the corresponding document.

# Copying Documents

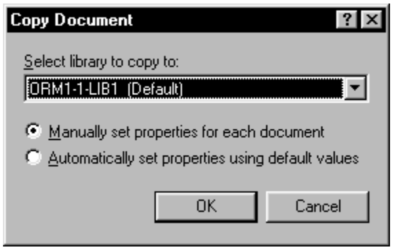
You can copy documents and their properties to create similar documents. Copying a document creates a new document in the library.

When you copy a document you can specify how you want to create document properties for the new document. You can specify properties manually for the document, or you can have GroupWise create properties for you using the values in the source document.

## Copying a Document

1 Click a document reference in your Mailbox.

2 Click Actions ▸ Copy Document.




3 Select the method you want to use to create a property sheet for the document.

4 Click OK.

## Copying a Document to Another Library

1 Click the document reference in your Mailbox.

2 Click Actions ▸ Copy Document.

3 Select the library to which you want to copy the document in the Select Library to Copy to drop-down list.

4 Select which method you want to use for creating document properties ▸ click OK.

**Tips**

- The information in the system fields (document type, author, and subject) is copied with the document to the new library.

# Saving Documents

You can use Save As to save documents outside of the GroupWise Library. Save As lets you create a copy of a document outside of the Library; however, when you use Save As, any changes you make to the saved document are not updated in the Library.

## Saving Changes to a Document's Contents

To save changes you have made to the contents of a document, use the Save feature in the corresponding application.

The Save feature in your application functions differently depending on whether you are using an integrated or a non-integrated application.

**Saving Documents in Non-Integrated Applications**

If you are using non-integrated applications (all Windows 3.1 applications and many Windows 95 applications), you can't save the document as a new version from the application. To create a new version of the a document, you must create the new version before you open the document. To make sure your changes are saved in the Library, don't rename the document when you save it.

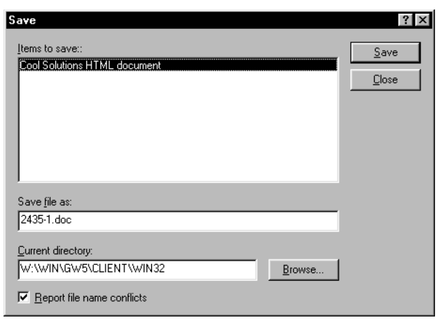
**Saving Documents in Integrated Applications**

If you are using an integrated application (such as WordPerfect 7 or Word 7), GroupWise can integrate the document management features with the application's Save As feature. When you select Save As in the application, you have the option of saving the document as a new version in the GroupWise Library. In addition, you can select the GroupWise folder you want to save the document in.

## Saving Documents Outside of the GroupWise Library

**1** Click the document reference in your Mailbox.

**2** Click File ▸ Save As.




**3** In the Save File As text box, specify a name for the document.

**4** Click Browse ▸ specify the path to the location where you want the document saved ▸ click OK.

**5** Click Save.

**Tips**

- To share documents with users who do not have access to GroupWise, use Save As to make a copy of a document outside of the Library.

# Opening Documents

When you double-click a document reference in your Mailbox or folder, GroupWise opens the document in the associated application. You can then edit the document. If you do not have rights to edit the document, you cannot open it; however, you can view the document in the QuickViewer.

GroupWise sets an In Use status on the selected version of the document while you have it open. This status locks the selected document version and prevents other users from editing it while you have it open. When you exit the document, the In Use status is removed and the version is unlocked.

If you want to lock a version of a document for multiple editing sessions, use Check Out. Check Out lets you copy the selected version of a document to another location, and it remains locked until you check it in.

### Opening Documents in GroupWise Remote

If you are using GroupWise Remote, you must manually mark the document version as In Use when you retrieve it from your Master Mailbox. When you exit the document, Remote prompts you to clear the In Use status.

### Opening Documents in Non-Integrated Applications

If you are using non-integrated applications (All Windows 3.1 applications, MS DOS applications, and many Windows 95 applications), GroupWise tracks the application, not the document, and moves the document back to the library when the application closes, not when the document is closed.

### Opening Documents in Integrated Applications

If you are using an integrated application (such as WordPerfect 7 or Word 7), GroupWise can integrate the document management features with the application's Open and Save As feature.

When you select Open in the application, the dialog displays all the available document references in your Mailbox and folders. You can select a document reference to open the document, or you can click the Select Document Using Application Dialog button to use the application's regular Open dialog box.

## Opening Documents

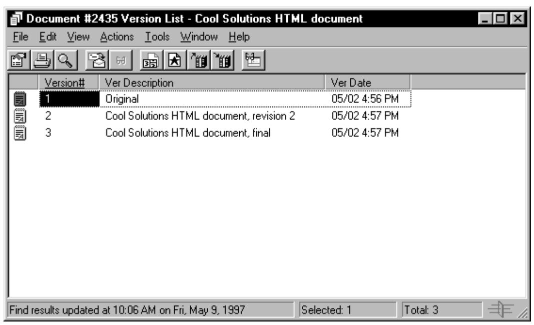
1 Double-click the document reference in your Mailbox.

> **Tips**
> - When you open a document, it is marked as In Use which prevents other users from editing it while you have it open.
> - If you do not have access to the application the document was created in, GroupWise prompts you to specify an application. You may be able to open the document in a related application.

## Opening Multiple Versions of a Document

1 Click the document reference in your Mailbox.

2 Click Actions ▸ Version List.




3 Select the versions you want to open in the Versions list box.

4 Click Actions ▸ Open.

# Customizing GroupWise

# Setting Options for GroupWise

Use Options to customize GroupWise® by setting options that are in effect each time you start GroupWise. You can set options that make your work more efficient, change how GroupWise looks, and accomplish specific tasks.

For example, you can use Environment Options to change the interface language GroupWise uses, or you can use Send Options to specify that you get a return receipt for every message you send. You can also use Options to subscribe to Notify, specify an archive folder, change the security label on items you send, and so forth.

## Delaying Delivery of an Item

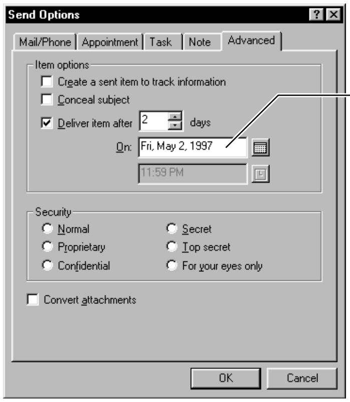
**1** To delay the delivery of one item, open an item view ▸ click File ▸ Properties ▸ the Advanced Send Options tab.

*or*

To delay delivery of all items you send, click Tools ▸ Options ▸ double-click Send ▸ click the Advanced tab.

**2** Click the Deliver Item After check box.

**3** In the Deliver Item After text box, specify how many days later you want the item delivered.




*The day and time the item will be delivered appear in the On box.*

**4** Click OK.

## Getting a Return Receipt for Items You Send

**1** To get a return receipt for one item, open an item view ▸ click File ▸ Properties.

*or*

To always get a return receipt for items you send, click Tools ▸ Options ▸ double-click Send ▸ click the tab of the item type you want to change.

**2** In the Return Notification group box, specify the type of return receipt you want.


**3** Click OK.

**Tips**

- To get a return receipt through Notify, you must first subscribe to Notify. See *Running Notify*.

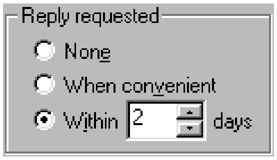
## Requesting a Reply for Mail and Phone Messages You Send

**1** To request a reply for one item, open an item view ▸ click File ▸ Properties.

*or*

To request a reply for all items you send, click Tools ▸ Options ▸ double-click Send ▸ click the Mail/Phone tab.

**2** In the Reply Requested group box, specify when you want to receive the reply.




**3** Click OK.

**Tips**

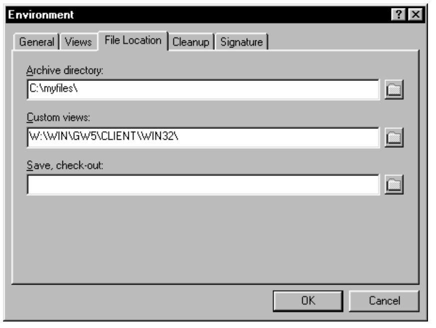
- The recipient sees  at the top of the message. If you select When Convenient, "Reply Requested: When convenient" appears at the top of the message. If you select Within x Days, "Reply Requested: By xx/xx/xx" appears at the top of the message.

## Specifying Where Archived Items Are Stored

1 Click Tools ▸ Options.

2 Double-click Environment ▸ click the File Location tab.

3 Specify the location of your Archive directory in the Archive Directory text box.

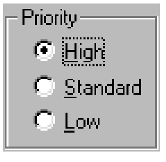



4 Click OK.

## Changing the Priority of Items You Send

1 To change the priority of one item, open an item view ▸ click File ▸ Properties.
*or*
To change the priority of all items you send, click Tools ▸ Options. Double-click Send ▸ click the tab of the item type you want to change.

2 In the Priority group box, select High, Standard, or Low.




3 Click OK.

**Tips**

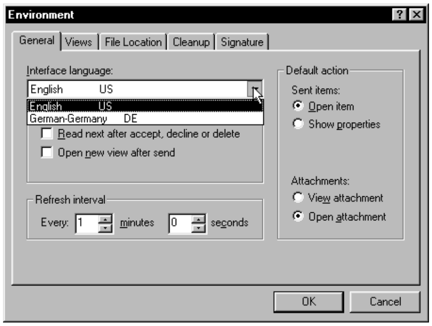
- The small icon next to an item in the Mailbox is red when the priority is high, white when the priority is standard, and gray when the priority is low.

## Changing the GroupWise Interface Language

**1** Click Tools ▸ Options.

**2** Double-click Environment ▸ click the General tab.

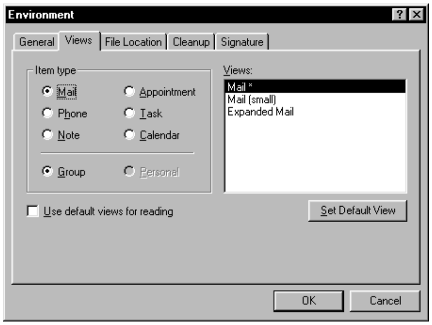
**3** Click a language in the Interface Language pop-up list.




## Changing Your Default Views

**1** Click Tools ▸ Options.

**2** Double-click Environment ▸ click the Views tab.




**3** Select an item type.

**4** If the selected item type is Task, Appointment, or Note, select Personal or Group.

**5** Click the view you want as your default in the Views list box.

**6** Click Set Default View.

GroupWise marks the item as the default by placing an asterisk (*) next to the view name in the list box.

**7** Repeat Steps 3-6 until you have selected a default view for each view type.

**8** Click OK.

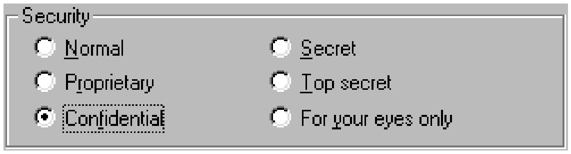
## Changing the Security Label of an Item

1. To change the security label of one item, open an item view ▸ click File ▸ Properties ▸ the Advanced Send Options tab.

   *or*

   To change the security label of all items you send, click Tools ▸ Options ▸ double-click Send ▸ click the Advanced tab.

2. In the Security group box, select the security label you want.

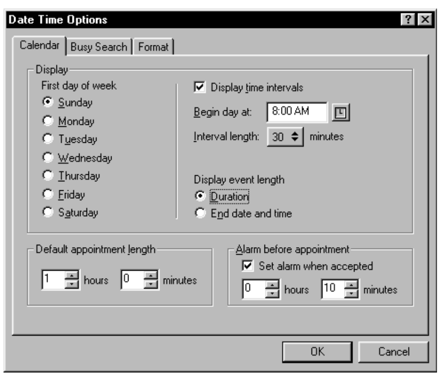



3. Click OK.

> **Tips**
>
> - The security options only place a label at the top of the Message box; they do not encrypt the item text. When Normal is selected, no security label appears in the items you send.

## Specifying How Long Before an Event an Alarm Sounds

1. Click Tools ▸ Options.
2. Double-click Date & Time ▸ click the Calendar tab.
3. Click Set Alarm When Accepted.
4. Specify the hours and minutes before an event that you want an alarm to sound.




5. Click OK.

# Assigning Passwords to Your Mailbox

You can assign a password to your Mailbox to prevent others from accessing your GroupWise items without permission. Passwords are case-sensitive (for example, Wednesday is not the same as WEDNESDAY). Once you assign a password, you are prompted for it each time you open GroupWise. If you decide you no longer want to be prompted for a password, you can remove it. If you want Windows® to remember your password the next time you log in as yourself on the machine, click Remember Password. If you forget your password, you will not have access to any of your items.

Setting a password for your Mailbox does not affect your proxies' ability to access your Mailbox. A proxy's ability to access your Mailbox is determined by the rights you assign him or her in your Access List.

To use GroupWise Remote, you must assign a password to your Master Mailbox. If you assign a password when you're running Remote, the password you create affects your Remote Mailbox only. For example, if you are running GroupWise Remote at home and you create a password in Security Options, the password you create is in effect only for your Remote Mailbox. The password does not affect your Master Mailbox at the office.

## Creating a Password for Your Mailbox

1 In the Main Window, click Tools ▸ Options.

2 Double-click Security ▸ click the Password tab.

3 In the New Password text box, type the password.

4 In the Confirm New Password text box, type the password ▸ click OK ▸ Close.

**Tips**

- Passwords are case-sensitive (for example, Wednesday is not the same as WEDNESDAY).
- If you use GroupWise Remote, you must assign a password to your Master Mailbox. To create a password for your Remote Mailbox only, run Remote before using the steps above.

### Removing Your Password

1 Click Tools ▸ Options.

2 Double-click Security ▸ click the Password tab.

3 Type your old password ▸ click OK.

4 Click Clear Password.

5 Click OK ▸ Close.

### Changing Your Password

1 In the Main Window, click Tools ▸ Options.

2 Double-click Security ▸ click the Password tab.

3 In the Old Password text box, type the password you want to change.

4 In the New Password text box, type the new password.

5 In the Confirm New Password text box, type the new password again ▸ click OK ▸ Close.

**Tips**

- If you forget your password, you will not be able to access GroupWise. Contact your system administrator for assistance.
- Passwords are case-sensitive.

# Customizing Your Toolbar

Use the toolbar to access many of the features and options found in GroupWise. When you use certain features (for example, when you are in your Calendar), the toolbar for that feature appears.

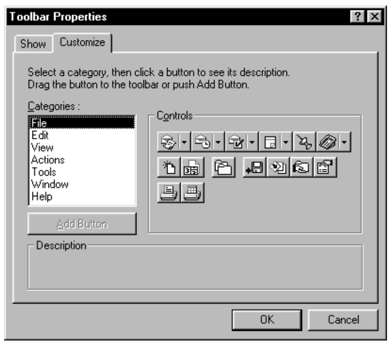
To find out about a toolbar button, move the mouse pointer over the button and read the tool tip that appears.

You can customize each toolbar by adding and deleting buttons, choosing button order, and placing separators between buttons.

**1** If the toolbar is not displayed, click View ▸ Toolbar.

**2** Right-click the toolbar ▸ click Properties.

**3** Click the Customize tab.




**4** To add a button, click a category from the Categories list box ▸ click a button in the Controls box ▸ click Add Button.

Categories are menu titles in the Main Window. The buttons in the Controls box correspond to features found under the menu title. For example, the buttons for the File category are actions under the File menu (opening views, printing, saving, and so on).

**5** To remove a button, drag it off the toolbar.

**6** To change the order of a button on a toolbar, drag it to where you want it to display.

**7** To add or remove space between buttons, drag one button away from or toward the other button.

**8** Click OK.

**Tips**

- Toolbars change depending on the view you are in. To customize a toolbar, you must be in the view displaying that toolbar.
- To change the default view of mail messages, appointments, and tasks on the toolbar, click the down arrow to the right side of the button ▸ select the new default view.
- You can also add buttons by dragging them from the Controls box onto the toolbar.
- If you want to view a description of a button, select the button in the Controls box ▸ read the button's description in the Description box.
- You can choose if toolbars display with pictures only or with both pictures and text. You can also choose to display your buttons in one row only or in multiple rows, depending on the number of buttons.

# Customizing Your Library Settings

GroupWise lets you customize settings for the libraries in which you store and create documents. You can specify a default library, default document properties layout (such as the order and size of fields) and default values for document properties. You can also specify whether you want to use the short or long form of the property sheet. The library and property settings you specify only affect your library setup. You cannot modify other users' settings.

### Default Property Values

You can specify default values for the document property fields that can be edited. The default values are used when you create a new document or import a document into the selected library. If no default values have been specified for author and document type, GroupWise uses the creator's name as the author and Document as the document type. See *Managing Your Documents in GroupWise* under *Creating and Working with Documents*.

### Document Tab Configuration

You can customize the display of the Document tab in Properties. The Document tab appears each time you create, import, copy, or select Properties for a document. You can specify which fields you want to display on the Document tab. In addition, you can specify the number of lines in each field, the field's order on the dialog box, and you can insert blank lines and separators on the dialog box.

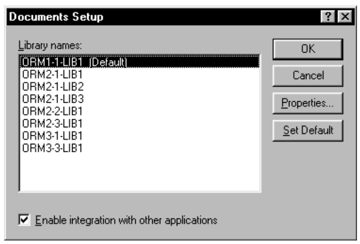
### Document Property Sheets

When you create a new document or a new version of a document, GroupWise prompts you to specify document properties. You can specify whether you want GroupWise to prompt you for the document subject only or for all the document properties.

### Setting the Default Library

You can change the default library. When you create, import, or copy a document in GroupWise, it is saved in the default library, unless you specify a different library. In addition, Find searches for documents in the default library first.

1. Click Tools ▸ Options ▸ double-click Documents.
2. Click the library you want to use as a default.




3. Click Set Default ▸ OK.

# Using Startup Options

GroupWise has optional commands that you can use when you start the program. Some of these options are for your convenience, while others are necessary to run GroupWise on your particular hardware.

### GroupWise Startup Options

| This Startup Option | Does This |
|---|---|
| /bl | Prevents the GroupWise logo screen from being displayed when you enter the program. |
| /c | Checks for unopened items. If there are unopened items, GroupWise opens as usual. Otherwise, GroupWise does not start. |
| /cm | Checks for unopened items. If there are unopened items, GroupWise opens minimized and a beep sounds. Otherwise, GroupWise does not start. |
| /ipa-<IP address> | Lets you specify the IP address. Type the address in place of <IP address>. |
| /ipp-x | Lets you specify the IP port. Type the port number in place of x. |

| This Startup Option | Does This |
|---|---|
| /l-xx | Applies only if you have two or more language versions or language modules. This option instructs GroupWise to override the default environment language (under General Environment in Options) with the language specified by the language code (xx). The language codes are listed below. |
| /la-<network ID> | Lets you log on to another user's computer using your network ID. The other user remains logged on to the network. Type your network ID in place of <network ID>. |
| /nu | Turns off AutoUpdate. If this option is selected, click View ▸ Refresh whenever you want to update the display with the items currently in your Mailbox. |
| /ph-pathname | Lets you specify the path to the post office. |
| /ps-path to Remote database | Opens GroupWise in Remote mode. This startup option can be used in the Target text box only. |
| /@u-? | Displays a login dialog box whenever you open GroupWise, allowing you to supply any necessary login information. |
| /@u-user ID | Lets you use your GroupWise user ID to log into GroupWise as yourself on another user's computer. The other user remains logged on to the network. |

The following table lists the language codes used by all Novell® products. GroupWise may not yet be available in some of the listed languages. For current information, contact your local reseller.

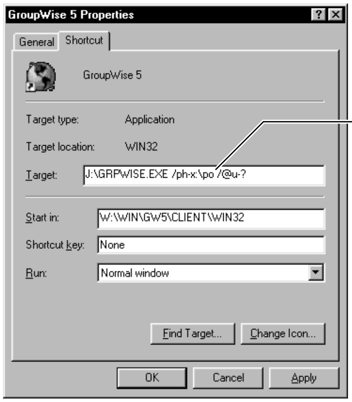
| Language | Language Code |
|---|---|
| Afrikaans | AF |
| Arabic | AR |
| Catalan | CA |
| Croatian | HR |
| Czechoslovakian | CS |
| Danish | DK |
| Dutch | NL |

| Language | Language Code |
|---|---|
| English-Australia | OZ |
| English-Canada | CE |
| English-United Kingdom | UK |
| English-United States | US |
| Finnish | SU |
| French-Canada | CF |
| French-France | FR |
| Galician | GA |
| German-Germany | DE |
| German-Switzerland | SD |
| Greek | GR |
| Hebrew | HE |
| Hungarian | MA |
| Icelandic | IS |
| Italian | IT |
| Japanese | NI |
| Norwegian | NO |
| Polish | PL |
| Portuguese-Brazil | BR |
| Portuguese-Portugal | PO |
| Russian | RU |

| Language | Language Code |
|---|---|
| Slovak | SL |
| Spanish | ES |
| Swedish | SV |
| Turkish | TR |
| Ukrainian | YK |

## Using a GroupWise Startup Option

1. Right-click the GroupWise icon on the desktop ▸ click Properties.
2. Click the Shortcut tab.
3. In the Target text box, after the GroupWise executable, type a space ▸ type the startup option(s) ▸ click OK.




*Separate multiple startup options with a space.*

4. Restart GroupWise.

### Tips

- In the example above, /ph- is the startup option to specify the path to the post office. The x:\po portion is the path to the post office. The option /@u-? is used to display a login dialog box a user can supply with login information whenever he or she opens GroupWise. This option is useful when two or more users share a workstation but have separate GroupWise Mailboxes.

# Finding Items in Your Mailbox

# Finding Items

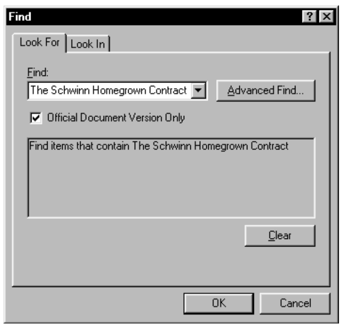
Use Find to look for items that match the criteria you specify. You can tell Find where to look (which folders or document libraries, for example), and precisely which documents or messages to look for. You can save the results in a Find folder.

If you use GroupWise® Remote, you can find items in both your Remote and Master Mailboxes.

## Finding an Item

1 Click  on the toolbar.

2 In the **Find** box, type the text you are looking for.




3 Click OK.

**Tips**

- The results of the search are displayed in the GroupWise Find Results folder, which opens when the search is completed.
- Find searches all folders and libraries selected in the Look In tab. To narrow your Find, click the **Look In** tab and deselect unnecessary folders and libraries.
- Use Advanced Find to make your search more specific. For example, you may want to search for messages from two or three users at once.
- Use **Find Text** rather than Find to look for text in an item you currently have open. See *Finding Text in Items* under *Finding Items in Your Mailbox*.
- For additional information about finding items, click **Help** ▸ **Help Topics** ▸ click the **Index** tab ▸ type tips in the text box to open the Find Quick **Tips** help topic.

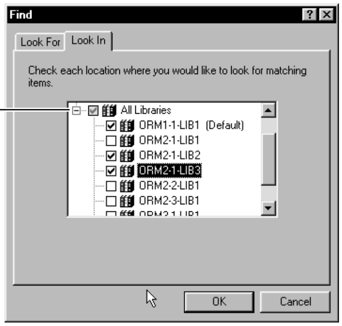
## Specifying Where You Want to Search

1 Click  on the toolbar.

2 Click the **Look In** tab.

3 Click the folders and/or libraries you want to search in.

*You may need to click + next to your user folder to expand the folder structure.*




4 Click **OK**.

### Tips

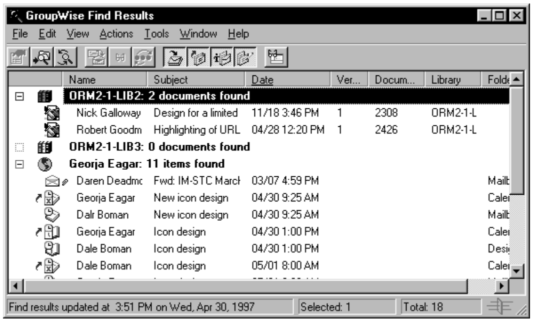
- Your folders and libraries are marked for search by default with a check in the box. Folders not marked contain dimmed boxes.
- To speed up your search, unmark any folders you don't want to search.

## Saving the Results of a Find

1 Click  on the toolbar.

2 Perform a Find.

3 In the GroupWise Find Results dialog box, click **File** ▸ **Save As Folder**.




4 Type a name for the folder ▸ click **Up**, **Down**, **Right**, or **Left** to position your folder ▸ click **Next**.

5 Type a description for the folder ▸ click **Finish**.

> **Tips**
> - You can update a Find folder each time you open it.
> - The Find folder is placed in the Cabinet in the Folder List.
> - To see your Find results at any time, select the folder. Find folders are easy to distinguish in your Folder List by the magnifying glass on the folder icon.

---

## Looking for Multiple Words in Items Using Advanced Find

1 Click  on the toolbar.

2 Click Advanced Find.

3 Select a field in the drop-down list on the left ▸ click an operator ▸ type or select a condition.

**4** Click OK if your filter is complete.

*or*

Click the last drop-down list ▸ click And, Or, Insert Row, or New Group to add more filter criteria ▸ add more criteria for your filter ▸ click End in the last pop-up list ▸ OK.

**Tips**

- The results of the search are displayed in the GroupWise Find Results dialog box, which opens when the search is completed.
- Find searches all folders and libraries selected in the Look In tab. To narrow your Find, click the Look In tab and deselect unnecessary folders and libraries.
- Use Find Text rather than Find to look for text in an item you currently have open.
- Click Delete Row on the Parameter drop-down list to remove a row from your filter definition. You cannot delete a one-row filter.
- Click Insert Row on the Parameter drop-down list to make your filter more specific. Additional rows narrow your search criteria even further. For example, to search for items from John Smith that were carbon-copied to Mary Jones, the first row searches for John Smith. The second row searches for Mary Jones.

## Narrowing an Advanced Find Using Filter Operators

When you click Advanced Find, the Advanced Find dialog box appears. Select the operator from the drop-down list box to the right of the first box. The list of available operators changes depending on the selection you make in the first box. Some operators, such as [], have two or more distinct names. While the name may change, the purpose of the operator remains the same. For example, the [] operator in the table below finds all items containing John in the From box or including a Sound file in the Attachment List.

**Table of Operators**

| Operator | Include | Examples |
|---|---|---|
| [] Contains | All items containing the condition | From[]John, Attachment List[]Sound |
| ¦-> Begins With | All items whose first text begins with the condition | Author¦->Karen |
| -> Within | All items falling within a range starting forward from a certain day | Created->5 Day (created within 5 days of today) |

| Operator | Include | Examples |
|---|---|---|
| <- Previous | All items falling within a range starting backward from a certain day | Created <-5 Day (created 5 days or fewer previous to today) |
| = Matches, Equal To, Equal To Field, On | All items that equal the condition | Cc=Jill, Document Creator=JFerguson, Retrieved Date=Tomorrow |
| ! Does Not Include, Not Equal To, Not Equal To Field | All items except the condition | Item Status!Opened, Number Accepted!5 |
| < Before,Less Than, Less Than Field | All items less than the condition | Retrieved Date<Today, Document Number<1000 |
| <= On or Before, Less Than or Equal To, Less Than or Equal To Field | All items less than or equal to the condition | Retrieved Date<=Yesterday, Total Recipients<=10 |
| > After, Greater Than, Greater Than Field | All items greater than the condition | Retrieved Date>This Week,Version Number>4.0 |
| >= On or After, Greater Than or Equal To, Greater Than or Equal To Field | All items greater than or equal to the condition | Retrieved Date>=This Month, Number Replied>=7 |

# Finding Text in Items

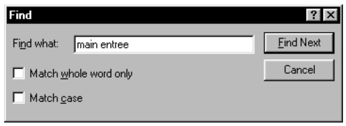
Use Find Text to search for a string of text in an item you are reading or sending. GroupWise searches only the text in the Message box or in an attachment that is open in the Viewer. You can also search for text in the QuickViewer. To find multiple words, or to search in multiple items, use Find in the Tools menu.

## Finding Text in an Item

**1** Open an item.

**2** Click Edit ▸ Find Text.

**3** Type the text you want to search for in the Find What box.




**4** Click Find Next to search for the text you typed.

> **Tips**
>
> - To search for items that contain specific text, use Find in the Tools menu. See *Finding Items* under *Finding Items in Your Mailbox*.

# Filtering

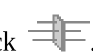
If your Mailbox contains many items, you might have a difficult time finding certain items. Filter lets you display items according to specific criteria. For example, a filter can display only items that have a certain word in the subject.

You can also use a filter to hide items that you want to get out of your way. Filter does not actually move or delete items; it displays certain items based on the criteria you specify. Filters you create affect all folders. Once you clear the filter, all the items reappear.

## Displaying or Hiding Items in Your Mailbox Using Filter

**1** Click a folder (such as Mailbox, Trash, or a folder you have created).

Filters affect all folders. You are instructed to click a folder to see the filter results immediately.

**2** In the lower-right corner of the Main Window, double-click .

3 In the first box, click the field you want to filter. For example, click From if you want to filter items from a specific person.


4 Click the operator drop-down list ▸ click an operator.

5 Type the criteria for the filter or click the Down-arrow if provided, then click an existing criteria.

If you type criteria, such as a person's name or a subject, you can include wildcard characters such as an asterisk (*) or a question mark (?). Text you type is not case-sensitive.

6 Click the last drop-down list ▸ click End.
*or*
Click And or Or to narrow your filter by adding more filter criterion.

**Tips**

- Read the text in the dialog box beginning with "Include entries where..." as you create your filter. This summarizes how your filter will work.
- The filter icon changes to indicating that a filter is active.
- To cancel the filter, click ▸ Clear Filter.

## Displaying or Hiding Items in Your Calendar Using Filter

1 Click the Appointments, Notes, or Tasks list in a calendar view.

2 In the lower-right corner of the calendar view, double-click .

3 In the first box, click the field you want to filter. For example, click From if you want to filter items from a specific person.

4 Click the operator drop-down list ▸ click an operator.

5 Type the criteria for the filter or if provided click the Down-arrow, then click an existing criteria.

If you type criteria, such as a person's name or a subject, you can include wildcard characters such as an asterisk (*) or a question mark (?). Text you type is not case-sensitive.

6 Click the last drop-down list ▸ click End.
*or*
Click And or Or to narrow your filter by adding more filter criterion.

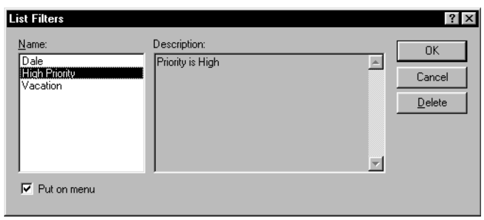
**Tips**

- Read the text in the dialog box beginning with "Include entries where..." as you create your filter. This summarizes how your filter will work.
- The filter applies to all lists in the calendar view. For example, if you click the Notes list in Step 1 above, the Appointments and Tasks lists are also affected by the filter.
- The filter icon changes to indicating that a filter is active.
- To cancel the filter, click ▸ Clear Filter.

## Using an Existing Filter

1 In the lower-right corner of the Main Window, double-click .

2 Click the Filter pull-down menu ▸ Open.




3 Click the filter you want to use ▸ OK.

**Tips**

- If you've recently used a filter, you can select it from the View ▸ Filter menu. GroupWise lists the four most recently used filters.
- If you've never saved a filter, you cannot open an existing filter, but you can create a filter and save it.

## Clearing a Filter

1 In the lower-right corner of the Main Window, click ▸ Clear Filter.

**Tips**

- You can also right-click an item's subject in the filtered view, then click Clear Filter.
- After you've cleared a filter, the icon in the lower-right corner of the Main Window changes back to .
- If the filter is saved, you can use it again by clicking Filter ▸ Open in the Filter dialog box.

## Deleting a Filter

1 In the lower-right corner of the Main Window, double-click .

2 Click the Filter pull-down menu ▸ Open.

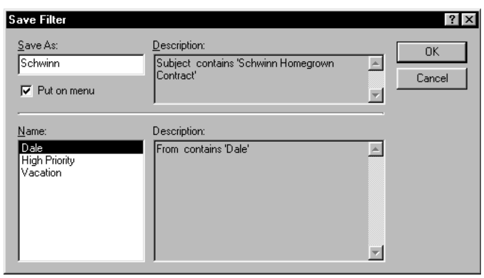
3 Click the filter you want to delete ▸ Delete.

## Saving a Filter

1 In the lower-right corner of the Main Window, double-click .

2 Specify the filter criteria.

3 Click the Filter pull-down menu ▸ Save.




4 Type a name in the Save As box ▸ click OK.

**Tips**

- To access a saved filter, click Filter ▸ Open in the Filter dialog box.
- The Name box lists all the filters you have saved. You can click any existing filter name and see its description to the right.

## Narrowing Your Filter

You may want to limit your filter further by specifying additional criterion. Each filter criteria is displayed in a separate row. The four ways to add rows and narrow your filter are explained below. The following options are available in the last pop-up menu of each filter row.

**And**
Creates a new row. The filter will display items that match the conditions in each row joined by And.

**Or**
Creates a new row. The filter will display items that match the conditions in either row joined by Or. The items don't have to match the conditions in both rows.

**Insert Row**
Inserts a new row where the insertion point is located and pushes the remaining rows down. Insert Row is useful if you've already created a filter, and you want to add more criteria in the middle.

**New Group**
Begins a new group of rows. You can then join the groups by an And or Or. If two groups are joined by And, the items must match all conditions in both groups. If two groups are joined by Or, the items must match all conditions in either group, but not necessarily both.

**Tips**

- In the Filter dialog box, read the text beginning with "Include entries where..." as you create your filter. This summarizes how your filter will work.

## Using Filter and Rule Wildcard Characters and Switches

You can use the following wildcard characters and switches to narrow your filter or specify rule conditions. These are available in the Filter dialog box and the Define Conditions dialog box only when you've selected certain fields that require you to type additional text. For example, if you select the Subject field, you are required to type text that appears in the Subject line. Also, these wildcard characters and switches are applicable only when you select the [] Contains operator.

**List of Wildcard Characters and Switches**

| Wildcard Character(s) and Switches | What the Filter or Rule Will Match |
|---|---|
| AND, &, or a space | All items that meet two or more conditions. For example, **mountain & goat**, **mountain AND goat**, and **mountain goat** all find items containing the words "mountain" and "goat." |

| Wildcard Character(s) and Switches | What the Filter or Rule Will Match |
|---|---|
| OR or ¦ | All items that meet one of two or more conditions. For example, **mountain¦goat** and **mountain OR goat** both find items containing “mountain” or “goat” or both words. |
| NOT or ! | All items containing one condition but not the other. For example, **mountain ! goat** and **mountain NOT goat** both find items containing the word “mountain” but not the word “goat.” Items that contain both are not included. |
| " | All text found within quotation marks. For example, **“mountain goats”** finds all items containing the phrase “mountain goats.” This does not work with documents or document references. |
| ? | Matches any one character. For example, **jo?n** finds all items containing the word “john,” “joan,” “join,” and so on. |
| * | Matches zero or more characters. For example, **mountain*** finds all items containing the words “mountain,” “mountains,” “mountainous,” and so on. |
| /NOCASE (default) | Items containing the search terms, ignoring upper- and lowercase. For example, **/NOCASE ZOO** finds both “Zoo” and “zoo.” |
| /CASE | Items that match the upper- and lowercase pattern of the search terms. For example, **/CASE Zoo** finds “Zoo” but not “zoo.” |
| /WILDCARD (default) | Items containing the search terms where * and ? are treated as wildcard characters. For example, **/WILDCARD jo?n** finds “john”, “joan”, and “join.” |
| /NOWILDCARD | Items containing the search terms where * and ? are treated as characters. For example, **/NOWILDCARD jo?n** finds “jo?n.” |

## Using Filter and Rule Operators

The following table explains the operators you can use when creating a filter or a rule. The available operators depend on the field you have selected in the first drop-down list.

| Operator | Example | Result Includes |
|---|---|---|
| = Equal To | Item Type = Mail | Only mail messages |
| ! Not Equal To | Item Type ! Appointment | All item types except appointments |
| < Less Than | Number Accepted < 4 | Items in which less than 4 recipients accepted |
| <= Less Than or Equal To | Number Accepted <= 4 | Items in which 4 or fewer recipients accepted |
| > Greater Than | Number Read > 6 | Items that more than 6 recipients read |
| >= Greater Than or Equal To | Number Read >= 6 | Items that 6 or more recipients read |
| = Equal to Field | Number Accepted = Total Recipients | Items in which the number of recipients that accepted equals the total recipients |
| ! Not Equal to Field | Number Read ! Number Accepted | Items in which the number of recipients who read the item is not equal to the number of recipients who accepted |
| < Less Than Field | Number Opened < Total Recipients | Items in which the number of recipients who opened the item is less than the total number of recipients |
| <= Less Than or Equal to Field | Number Opened <= Total Recipients | Items in which the number of recipients who opened the item is less than or equal to the total number of recipients |

| **Operator** | **Example** | **Result Includes** |
|---|---|---|
| > Greater Than Field | Number Opened > Number Deleted | Items in which the number of recipients who've opened the item is greater than the number of recipients who've deleted the item |
| >= Greater Than or Equal to Field | Number Opened >= Number Deleted | Items in which the number of recipients who've opened the item is greater than or equal to the number of recipients who've deleted the item |
| [] Includes | Item Status [] Completed | Items which have been completed |
| ! Does Not Include | Item Status ! Accepted | Items which have not been accepted |
| [] Contains | From [] bill | Items in which the From field contains "bill" such as items from Bill Jones, Bill Smith, and so on |
| ¦-> Begins With | To ¦-> cli | Items in which the To field begins with "cli" such as "Client Group" or "Clive Winters" |
| = Matches | Subject = customer reports | Items in which the Subject line reads "Customer Reports" |
| = On | Created = Today | Items that were sent today |
| >= On or After | Created >= Yesterday | Items that were sent yesterday or later |
| > After | Created > Yesterday | Items that were sent later than but not including yesterday |
| < Before | Due/End Date < Tomorrow | Tasks that are due before tomorrow |

| Operator | Example | Result Includes |
|---|---|---|
| <= On or Before | Due/End Date < Tomorrow | Tasks that are due tomorrow or before |
| -> Within | Due/End Date -> 3 Day | Tasks that are due between and including today and three days after today |
| <- Previous | Due/End Date <- 3 Day | Tasks that were due between and including today and three days before today |
| = On Date | Created = 5/29/97 | Items that were created on May 29, 1997 |
| > After Date | Created > 5/29/97 | Items that were created after May 29, 1997 |
| >= On or After Date | Created >= 5/29/97 | Items that were created on or after May 29, 1997 |
| < Before Date | Created < 5/29/97 | Items that were created before May 29, 1997 |
| <= On or Before Date | Created <= 5/29/97 | Items that were created on or before May 29, 1997 |

## Understanding Filter and Rule Fields

The following table explains each of the fields available to you when you're creating a filter or a rule.

| Field Name | This Field Refers to: |
|---|---|
| Annotation | All personal notes you've created. You may have placed personal notes on mail messages, document references, and so forth. |
| Assigned Date | The start date of a task. This is the date the task begins appearing on your Calendar. This date does not change when your task is carried forward a day. |
| Attachment List | Types of attachments such as files, sounds, movies, or OLE objects. |

| Field Name | This Field Refers to: |
|---|---|
| Attachments | Attachments containing certain text or phrases that you specify. |
| Author | The name of the person who authored a document. |
| BC | Text appearing in the BC text box of an item. |
| Caller's Company | Text appearing in the Company text box of a phone message. |
| Caller's Name | Text appearing in the Caller text box of a phone message. |
| Caller's Phone Number | A phone number appearing in the Phone text box of a phone message. |
| CC | Text appearing in the CC text box of an item. |
| Copy Type | The type of copy a user receives (To, CC, or BC). |
| Created | The date an item was sent to the recipients. In other words, the date the sender clicked the Send button. Also refers to the date you posted a personal item to your Calendar. |
| Current File | The name of a document in the staging directory when the document is opened or checked out. |
| Current Location | The pathname to the staging directory when the document is opened or checked out. |
| Date Opened | The date a document was last opened. |
| Delivered | The date an item was delivered to the recipients. This is the date and time that the item appeared in the recipients' Mailboxes. |
| Document Creator | The name of the person who created the document. |
| Document Number | The number of a document. |
| Document Type | The type of a document in the library such as a form, expense report, memo, and so forth. |

| Field Name | This Field Refers to: |
| --- | --- |
| Due / End Date | The date that a task is due, or the end date and time of an appointment. |
| Filename Extension | The filename extension of a document in a library. |
| From | The name of a person in the From text box of an item. |
| Item Source | Where an item originated. In other words, whether the item was received, sent, personal, or draft. |
| Item Status | Whether an item has been accepted, completed, opened, read, marked private, or is hidden. |
| Item Type | Types of items such as mail messages, appointments, tasks, and so on. |
| Library | The library in which documents are stored. |
| Message | Text appearing in the Message box of an item. |
| Message Class | Other items such as forms, custom messages, and C3PO™s. |
| Number Accepted | The number of recipients that have accepted an item you've sent. |
| Number Completed | The number of recipients that have completed an item you've sent. |
| Number Deleted | The number of recipients that have deleted an item you've sent. |
| Number Opened | The number of recipients that have opened an item you've sent. |
| Number Replied | The number of recipients that have replied to an item you've sent. |
| Opened By | The name of the person who last opened this version of a document. |
| Place | Text appearing in the Place text box of an appointment. |

| Field Name | This Field Refers to: |
|---|---|
| Priority | The priority of an item. The priority can be high, standard, or low. |
| Send Options | Items with a reply requested send option. |
| Size | The size of an item including its attachments. |
| Started | The start date of an appointment or a task. When a task is carried forward to the next day, the start date becomes the new date. |
| Subject | Text appearing in the Subject box of an item. |
| Task Category | The alphabetical priority of a task(A, B, C, and so on) |
| Task Priority | The numerical priority of a task (1, 2, 3, and so on) |
| To | A person's name appearing in the To text box of an item. |
| Total Recipients | The total number of recipients of an item. |
| Version Created Date | The date a specific version of a document was created. |
| Version Creator | The name of the person who created this version of a document. |
| Version Description | The description of the document version. |
| Version Number | The version number of the document. |
| Version Status | Whether a document is checked in, checked out, opened, or closed. |
| View Name | The name of the view in which you're creating or reading an item. The view names correspond to the names displayed when you click the down arrow next to the item view buttons on the toolbar. |

# Sending and Receiving Workflow Items

# Using Workflow: An Overview

A workflow is a series of steps or tasks done by several people to accomplish a goal. Typically, a workflow contains an attached file which recipients can open in its source application. For example, rather than printing, copying, and delivering a file for review or approval, you can route it electronically as part of a workflow.

A workflow recipient can be anyone in the Address Book. You can send a broadcast workflow to all recipients at once. You can also send a sequential workflow to recipients in the order that you selected them from the Address Book, depending on how you want the work to be completed.

A workflow can have one attachment. An attachment can be a file or a link. In sequential workflows, changes made by recipients to attached files can be seen by the next recipients. Each recipient receives a work item in the Mailbox. When a recipient opens the work item, an attached file can be opened or edited. The four types of attachments are explained in the table below.

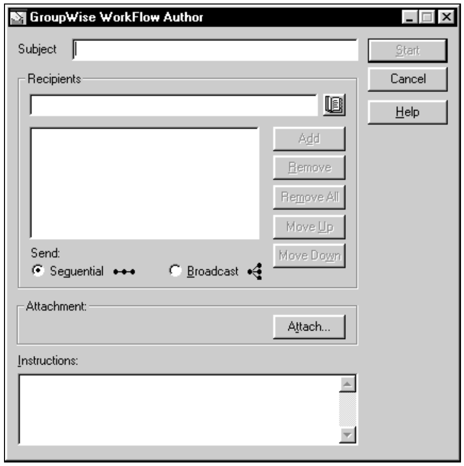
| Attachment Type | Description |
|---|---|
| File (sent with workflow) | A copy of a file from your local or network drive. Each workflow recipient receives a separate copy of the file. |
| File (link) | A link to a file stored on a network or shared location. Each workflow recipient opens the same file from the linked location. Use the \\SERVER\PATH\FILENAME format to specify a file link, such as \\NETWORK\DATA\RESUME.DOC. |
| DMS document | A link to a document in your GroupWise® Library. Workflow recipients can check out, check in, view, or open an attached document reference in the application that was used to create it, depending on the security privileges given to the recipients. |
| Internet address | A link to an Internet location using a uniform resource locator, such as http://www.novell.com/products.html. When workflow recipients open an Internet attachment, their Internet browser opens to the attached Internet address. |

As the workflow progresses, you can use your Mailbox or WorkFlow Central to check the workflow status. The status is updated each time a recipient completes a work item. When all work items are complete, you receive a workflow report, which displays the results of the workflow.

## Creating a Workflow

As a workflow originator, you decide what kind of workflow you want to send (broadcast or sequential). You should include instructions so recipients know what they should do. To check the progress of a workflow you sent, see *Tracking a Workflow's Status* later in this section.

**1** In GroupWise, click File ▸ New ▸ WorkFlow.




**2** Type a subject to identify the workflow.

**3** To add recipients, click ▸ click their names in the Address Book.

**4** To send the workflow to recipients one after another, make sure Sequential is selected.

*or*

To send to all recipients at once, click Broadcast.

**5** To attach a file, click Attach ▸ click the Type drop-down list ▸ an attachment type ▸ Browse ▸ click the file to attach ▸ Open ▸ OK.

*or*

In the Attachment box, type the filename, path, or Internet address ▸ click OK.

**6** Type instructions for the recipients.

7 Click Start.

**Tips**

- To add a recipient to a workflow, you can type the e-mail address in the Recipients box ▸ press Enter.
- To change the recipient order in a sequential workflow, click a name ▸ Move Up or Move Down.
- To remove a recipient from the list, click a name ▸ Remove. To remove all recipients, click Remove All.

## Participating in a Workflow

As a workflow participant, you receive a work item which you must complete for the workflow to continue. You can open work items in your Mailbox or WorkFlow Central.

A work item should contain instructions from the originator of the workflow explaining what to do. Typically, a work item also contains an attached file which you can open in its source application. Status information shows the workflow type (sequential or broadcast) and recipient information.

1 In your Mailbox or WorkFlow Central, open a work item.

2 Read the instructions.

3 Type your comments.

4 To open the attachment or go to the attached Internet address, click Open.

*or*

To open a document from your GroupWise Library, click Check Out. When you're done with the document, click Check In.

5 To display a recipient's comments, click the Status tab ▸ click a name in the Name list.

6 To send a mail message to another recipient, click the Status tab ▸ a name ▸ Reply.

7 To complete the work item and send it to the next recipient, click Done.

**Tips**

- When you open an Internet attachment, your Internet browser opens to the attached Internet address.
- To close the work item without completing it, click Close. The workflow will not continue to the next recipient until you open the work item again and click Done.
- To send a mail message to the person who started the workflow, click Reply. This is useful when you need more information to complete the work item.

## Viewing Status Information From a Work Item

1. Click the Status tab.
2. To display a recipient's comments, click a name in the Name list.
3. To send a mail message to a recipient, click a name ▸ Reply.

## Tracking a Workflow's Status

A workflow status message shows information about a workflow you have sent. It is updated each time a recipient completes a work item. You can open status messages in your Mailbox or WorkFlow Central.

A status message lists the recipients, their comments, and dates for completed work items. A check indicates the recipient has completed his or her work item.

1. In your Mailbox or WorkFlow Central, double-click a status message.
2. To display a recipient's comments, click a name in the Name list.
3. To send a mail message to a recipient, click a name ▸ Reply.
4. Click Close.

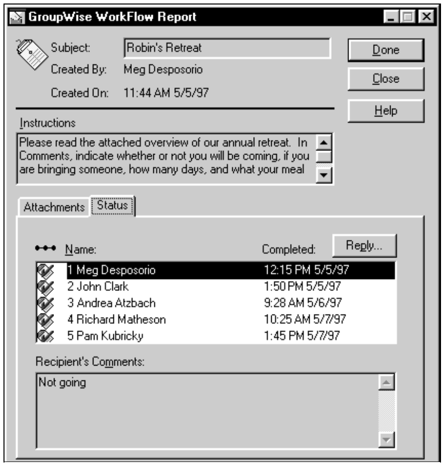
## Viewing a Workflow Report

If you sent a sequential workflow, a workflow report arrives in your Mailbox after the last work item is completed. If you sent a broadcast workflow, you receive a report after the first recipient completes a work item. The report is updated each time another recipient completes a work item. You can open reports in your Mailbox or WorkFlow Central.

A report shows the date that each work item was completed and the recipients' comments. You can open the attached file or reply to a recipient from a report.

1. In your Mailbox or WorkFlow Central, double-click a report.
2. To open or edit the attached file, click Open.

3 To display a recipient's comments, click the Status tab ▸ click a name in the Name list.




4 To send a mail message to another recipient, click the Status tab ▸ a name ▸ Reply.

5 Click Done.

## Viewing, Managing, and Deleting Your Workflows

WorkFlow Central keeps track of the workflows you create and participate in. Use WorkFlow Central to view, open, save, or delete work items, status messages, and reports.

WorkFlow Central gets information directly from the Data folder, the location where workflow message information is stored, typically C:\GWWF\DATA. If you delete a workflow message in your Mailbox, you can still open it in WorkFlow Central. If you delete a workflow message in WorkFlow Central, it is deleted in both WorkFlow Central and your Mailbox.

When a new workflow message is delivered to your Mailbox, a WorkFlow Central icon appears on the Windows® taskbar near the clock. Double-click the icon to start WorkFlow Central or display it on top of other windows. After you open the message, the icon disappears.

1 From your desktop, open WorkFlow Central.
*or*
In GroupWise, click Tools ▸ WorkFlow Central.

2 In WorkFlow Central, double-click a work item, status message, or report.

**3** To delete an item, click it ▸ Remove.

**Tips**

- When deleting items, a confirmation message appears if the item has not been completed.
- To delete multiple items, Ctrl+click each item ▸ click Remove.
- To delete a range of items, click the first item ▸ Shift+click the last item ▸ click Remove.

# Using the Address Book

# Using the Address Book: An Overview

Use the Address Book like a phone book and information center for your addressing needs. The Address Book can store names and addresses, e-mail addresses, phone numbers, and more. You can also dial the phone from the Address Book.

You can create multiple address books for your personal use.  Open address books are represented by tabs in the main Address Book window.  You can display one address book at a time.

Address books can store e-mail addresses as well as Internet addresses.  An e-mail address is the name a mail system uses to identify a person.  Internet addresses resemble regular e-mail addresses but apply to the Internet, meaning that you can send and receive mail from locations outside of your organization.

# Searching for Users and Resources

You can quickly find entries in the displayed address book by using the Search List. You can also specify search criteria by defining one or more filters. For example, you can define a filter which displays only entries with last names that begin with “D.”

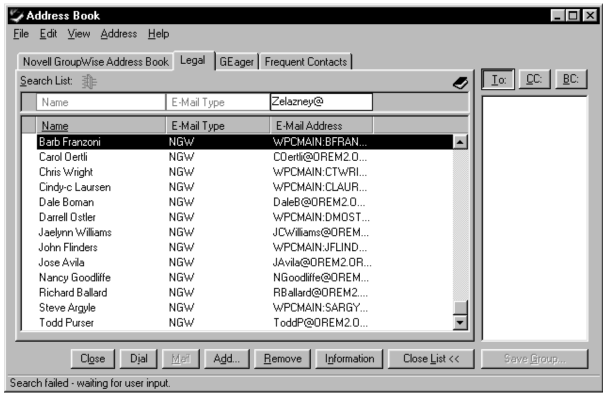
When you begin typing a name in the To, CC, or BC boxes of an item you are creating, Name Completion tries to complete the name for you.  It searches the Frequent Contacts address book, the most recently used address book, and the system address book for entries that match what you are typing (assuming these address books are open).

If Name Completion finds the name you are looking for, you can stop typing. If Name Completion doesn’t find it, continue typing: Name Completion searches again after each new character you type. If Name Completion finds a name that is close to but doesn’t exactly match the one you are looking for, you can use the Up or Down arrows to scroll to adjacent names in the Address Book. You can tell Name Completion to search your address books in a specific order.

## Searching for User, Resource, Organization, and Group Addresses

1. Click  on the toolbar.
2. Click the tab of the address book where you want to search for addresses.

**3** In a Search List box, begin typing what you are searching for.



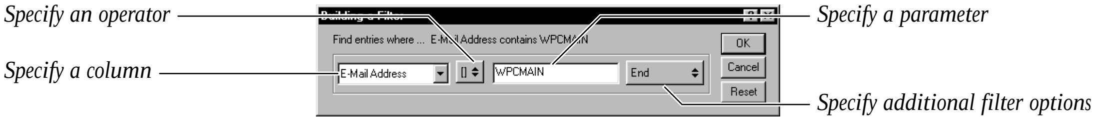

**Tips**

- Many columns in the Address Book have a Search List box. You can search for addresses using any Search List box. To narrow your search further, you can create a filter to tell the Address Book what you are looking for.

## Using Filters to Narrow an Address Search

**1** Click  on the toolbar.

**2** Click View ▸ Define Filter.



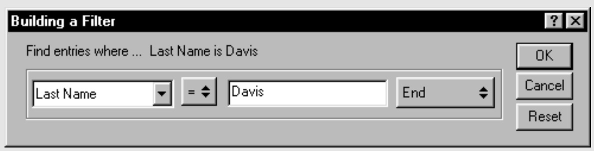

**3** Click the down arrow in the first box ▸ specify the column you want to filter by.

**4** Click the Operator drop-down list box ▸ specify an operator.

**5** Type the parameter you want to sort entries by ▸ click OK.

**Tips**

- An operator is a symbol that represents a mathematical operation. A parameter is a variable used with a command to indicate a specific value or option. For example, to create a filter that lists only users whose last name is Davis, click the Last Name column, click =, then type "Davis." In this example, =Equals is the operator and Davis is the parameter:




- After a filter has been defined for an address book, you can enable the filter again later by displaying the address book in which you want to enable the filter and clicking View ▸ Filtering Enabled.
- By selecting additional filter options in the Parameter drop-down list, you can add rows to and delete rows from your filter. You can also use And and Or operators or New Group to further narrow the filter.

# Using Groups to Address Items

A group is a list of users or resources you can send messages to.  Use groups to send a message to several users or resources by typing the group name in the To, BC, or CC text boxes. There are two types of groups: public and personal.

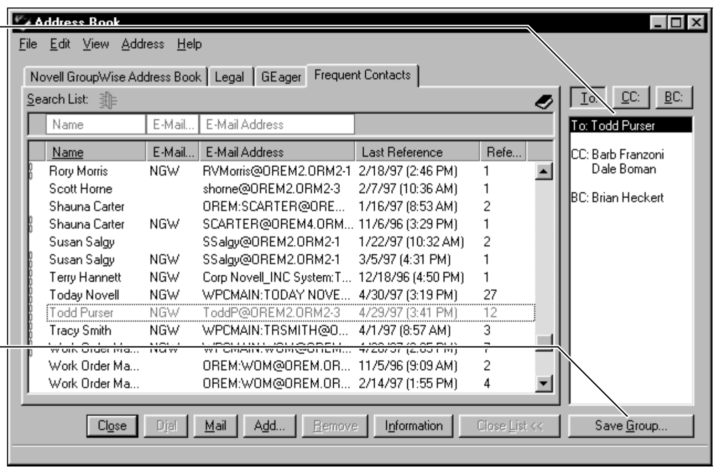
A public group is a list of users created by the system administrator and is available for use by each GroupWise® user. For example, there may be a public group for the Accounting Department.  Each employee in Accounting is included in the group. Public groups are listed in the system Address Book. A personal group is a group created by you. For example, if you often send an appointment to your work group, you can include each co-worker's address or name and a meeting place (a resource) in a personal group. Groups are marked with the  icon.

Personal address books and groups are different.  You create personal address books from the Address Book; you save groups from names already entered in the Address List.  A personal address book can be smaller than a system address book.  You can send items to all the users in a personal address book by clicking Edit ▸ Select All ▸ the To box.  With a group, you must select the group name in an address book and click To or type the name of the group into the To box.

## Creating and Saving a Personal Group

1 Click  on the toolbar.

*Address List*




*The Save Group button is dimmed when you're in the System Address Book.*

If the Address List is not visible, click Address List.

2 Click To, CC, or BC ▸ double-click or Ctrl+click and drag the users and resources for your group to the Address List.

3 Click Save Group.

4 Specify a name and personal address book for the group ▸ click OK.

**Tips**

- You can include users from different address books in one group. Groups are marked with the icon.
- You can save groups in personal address books only.
- You can save a group with any name you want. You can use spaces or any characters in the group name.

## Addressing Items to a Group

1. In an item view, click Address.
2. Select a group ▸ click To, CC, or BC.
3. Repeat as necessary.
4. Click OK to return to the item view.

**Tips**

- Name Completion searches the Frequent Contacts address book, the current address book, and the system address book, provided they are open.
- Public groups are located in the system address book.

## Adding and Removing Names from a Personal Group

1. Click ▸ the tab of the address book the group is located in.
2. Select the group ▸ click Edit ▸ Edit Group.
3. Modify the group in the Address List ▸ click Save Group ▸ OK.

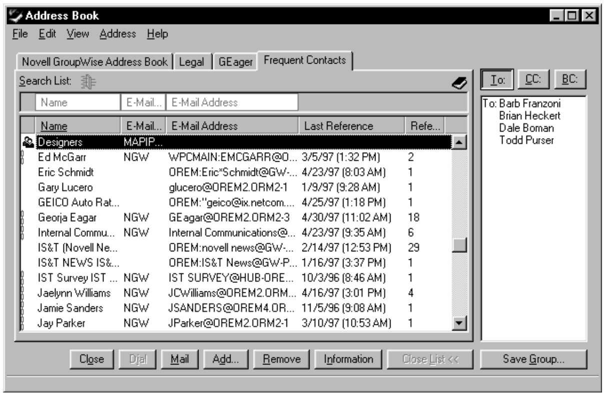
**Tips**

- To edit a group, you can also right-click the group entry in an address book ▸ click Edit Group. Groups are marked by the icon.
- The group entries appear in the Address List. You can double-click usernames in the address books to move them into the group or double-click usernames in the Address List to remove them from the group.

## Viewing Group Information

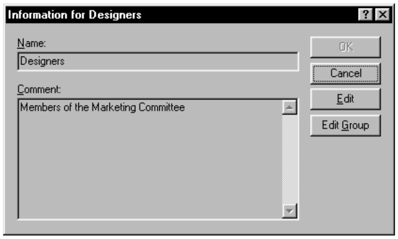
**1** Click  on the toolbar.

**2** To view the members of a group, click a group ▸ click Edit ▸ Edit Group.




The group is displayed in the Address List, where you can see the usernames. If it is a personal group, you can edit it. See *Creating Personal Address Books* under *Using the Address Book*.

**3** To view a description of the group, select the group ▸ click Information.



# Creating Personal Address Books

A personal address book is one that you create for yourself to fit your particular needs. You can create, edit, and save any number of personal address books. You have full rights to add and delete names and address information for any person, company, or resource you want in your personal address books.

When you create a personal address book, a tab is added to the main Address Book window. When you create multiple address books, you can include the same name and address in several books. If the entry is copied from an address book and you edit the entry's information in one book, it is updated in all books.

Personal address books group addresses according to your preferences. You can include Internet addresses or no address at all for the people you add to your personal address books. You can send items to all entries in a personal address book by clicking the To box above the Address List, then clicking Edit ▸ Select All, or you can create a personal group. If you save a list of people as a group, you only need to type the group name in the To box of an open send view to send the entire group a message.

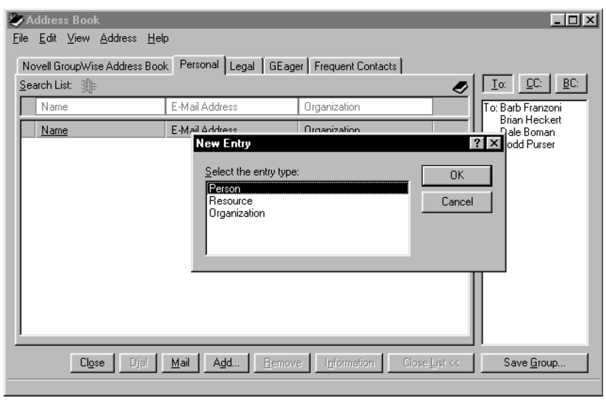
## Creating a Personal Address Book

**1** Click on the toolbar.

**2** Click File ▸ New Book.

**3** Type a name for the new book ▸ click OK.

**4** To add names to the new address book, click Add.




**5** Click the Entry Type ▸ click OK.

**6** Fill in the fields for the entry.

7 Click OK.

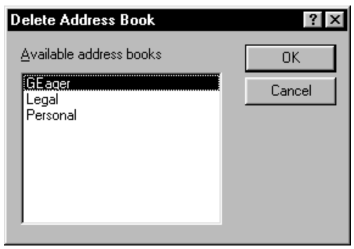
**Tips**

- You can copy names from existing address books into your new address book. See *Editing a Personal Address Book* later in this section.
- You can add and modify records in your personal address books. However, only the system administrator can add and modify records in the system address book.

## Deleting a Personal Address Book

1 Click  on the toolbar.

2 Click File ▸ Delete Book.




3 Click or Ctrl+click the books you want to delete ▸ click OK ▸ Yes.

**Tips**

- You can delete only personal address books.
- You cannot undelete a deleted address book from the Trash. Once it is deleted, an address book cannot be recovered.

## Editing a Personal Address Book

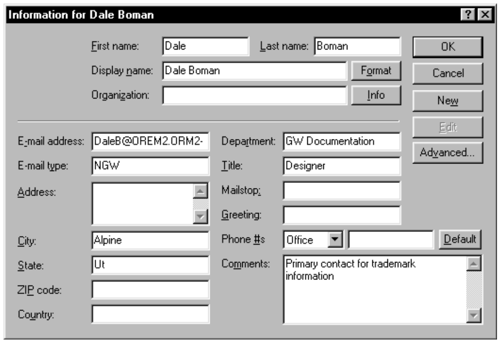
In a personal address book, you can add or delete entries, edit existing information, copy names from one book to another, or rename a book. You can also create your own information fields.

### Editing Names and Addresses in a Personal Address Book

1 Click  on the toolbar.

2 Click an address book tab ▸ click the name you want to edit.

3 Click Edit ▸ Edit.



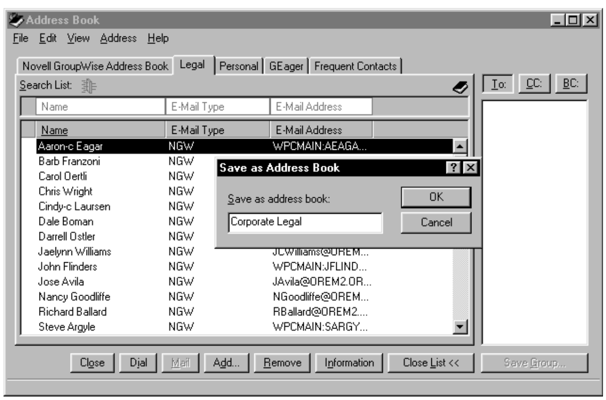

4 Edit the information ▸ click OK.

### Copying Names to a New Personal Address Book

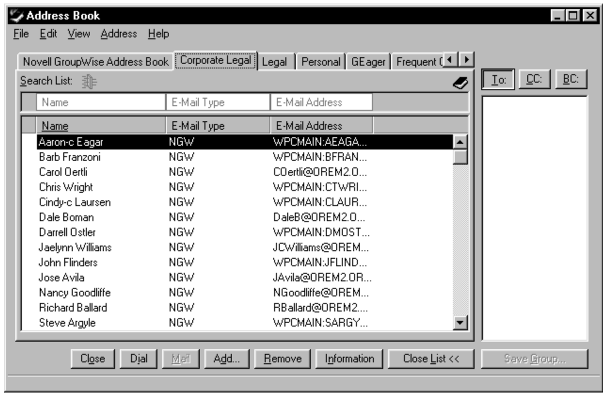
1 Click  on the toolbar.

2 Open the address book you want to copy.

3 Click File ▸ Save As Book.



4 Type a name for your address book in the text box ▸ click OK.




The new address book is represented by a tab with the name you specified. It is also listed in the list of available address books.

### Removing Names from a Personal Address Book

1 Click  on the toolbar.

2 Click an address book tab ▸ click or Ctrl+click the names you want to remove.

3 Click Remove ▸ Yes.

After you select names, you can also drag them off the address book to remove them, press the Delete key, or click Edit ▸ Remove.

## Synchronizing Address Book Entries

You can use Synchronize to make sure that your personal address book entries match the corresponding entries in the system address book. You can synchronize an entire personal address book or selected entries only.

For example, you may have a personal address book containing the names of your contacts in the marketing department. When the marketing department changes buildings and phone numbers, Synchronize saves you from having to create a new personal address book.

1 Click the tab of the personal address book you want to synchronize.

2 To synchronize an address book, click File ▸ Synchronize ▸ Current Book.

*or*

To synchronize selected entries, click the entries ▸ click File ▸ Synchronize ▸ Selected Items.

# Moving Addresses from One Address Book to Another

If another user has created a personal address book that would be useful to you, he or she can export a copy of it and send you the copy. You can then import the copy of the other user's personal address book instead of having to re-create the book from scratch. Any groups included in a personal address book cannot be exported.

## Importing Addresses into a Personal Address Book

1. If you have received a Novell® personal address book as an attachment, right-click the attachment ▸ click Save As ▸ select the folder or floppy disk you want to save it to ▸ click Save.
2. Open the address book you want to import addresses into. For steps, see *Displaying Different Information in the Address Book* under *Using the Address Book*.

   *or*

   Create a new personal address book to import the addresses into. For steps, see *Creating Personal Address Books*.
3. Click File ▸ Import.
4. Select the address book file ▸ click Open.

**Tips**

- Novell Address Book files have a .nab extension. They are ASCII files with specific formatting. If you want to import a non-Novell address book file, look at a .NAB file to determine its format, then mirror this format with your own address book's information.
- To change folders, click a folder in the Folders box. You cannot import addresses into the system address book.

## Exporting Addresses from the Address Book

1. Open the address book from which you want to export names.
2. Select the addresses you want to export.

   If you want to export an entire address book, you don't need to select any names.
3. Click File ▸ Export.
4. Click Entire Address Book if you want to export the entire address book.

   *or*

   Click Selected Items if you want to export the addresses you have selected.

5 Click a folder for the file to be saved to ▸ type a filename for the exported file ▸ click Save.

**Tips**

- The exported file is saved with a .nab extension (Novell Address Book). Any groups in the address book are not exported.
- Ctrl+click to select multiple addresses.

# Displaying Different Information in the Address Book

You can control which address book tabs are displayed in the main Address Book window by opening and closing address books. For example, you may have a personal address book for an account that you deal with only six months out of the year. You can close it when you don't need it and open it again six months later.

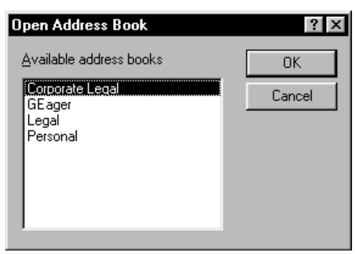
You can also control the information that is displayed in a single address book. In order for you to change displayed information in an address book, that address book must be opened.

Address books contain more information than can be displayed at one time. You can change what information is displayed at any time by selecting different column markers. You can also change column order, sort columns, or change their widths.

## Opening and Closing Address Books

1 Click  on the toolbar.

2 Click File ▸ Open Book.




If all of your address books are open, Open Book is dimmed.

3 Click or Ctrl+click one or more address books ▸ click OK.

4 To close an address book, click its tab ▸ File ▸ Close Book.

**Tips**

- When an address book is open, its name appears on a tab in the Address Book window.
- Closing an address book does not delete it; you can open it again at any time.
- You can open as many address books as you want. If you have more address books open than can be displayed on one line, click the arrows to the right of the tabs to display them.
- If the system and Frequent Contacts address books are closed, they will not be searched when you begin typing a name in the To, CC, or BC boxes of an item view.

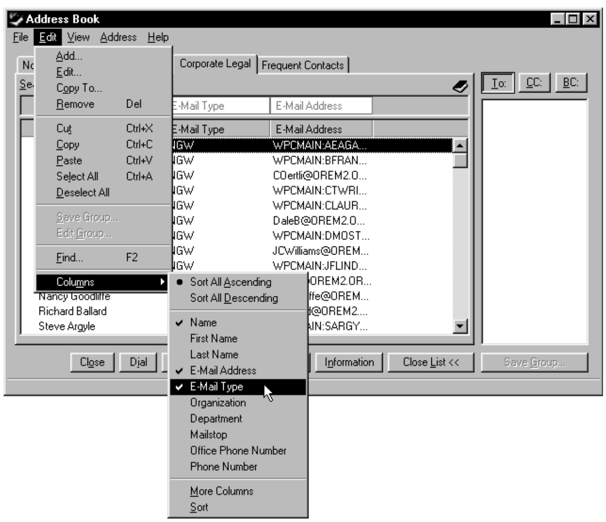
---

## Specifying the Columns to Display in an Address Book

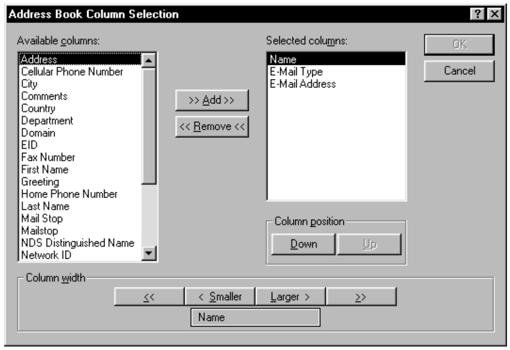
1 Click on the toolbar.

2 Click the tab of the address book you want to change the displayed columns in.

3 Click Edit ▸ Columns ▸ click a column name on the menu to display it or remove it from display.



4 If the column name you want is not displayed, click More Columns ▸ click the column in the Selected Columns list box ▸ click Add or Remove.




**Tips**

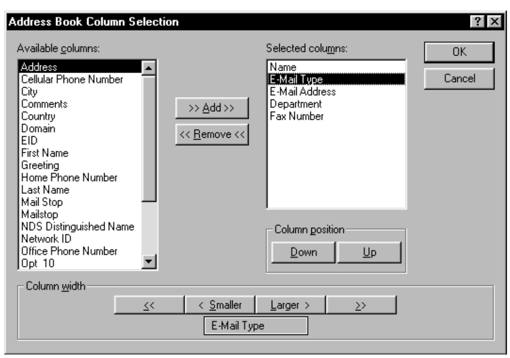
- To display another column of information, you can also right-click a column marker, then click a column name. To arrange columns, you can drag a column marker to another position.
- To remove a column marker, you can drag away the marker.
- You can select different column layouts for each address book.

## Changing the Order of Columns in the Address Book

1 Click  on the toolbar.

2 Click the tab of the address book you want to change the displayed columns in.

3 Click Edit ▸ Columns ▸ More Columns.




4 In the Selected Columns list box, click a column name ▸ click Down or Up.

5 To add a column, double-click a column name in the Available Columns list box.
*or*
To remove a column, double-click a column name in the Selected Columns list box.

**Tips**

- To display another column of information, you can also right-click a column marker, then click a column name.
- To arrange columns, you can drag a column marker to another position.
- To remove a column marker, you can drag away the marker.
- You can select different column layouts for each address book.
- You can Ctrl+click column names in either list box, then click Add or Remove to move multiple columns at once.

# Using the Address Book to Send Messages

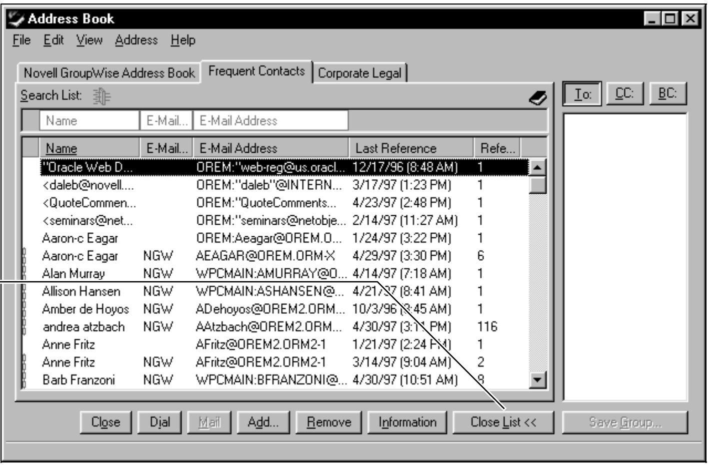
Address Book makes sending mail messages, appointments, tasks, notes, and phone messages easier and faster by helping you find the e-mail addresses of the users you want to send an item to.

You can open an item view and then open Address Book to find addresses or you can open Address Book first and open an item from there.

## Using the Address Book to Address an Item

1 In an item view, click Address.

2 Click an address book tab.




*This button toggles between Close List and Address List.*

3 If the To, CC, and BC boxes are not visible, click **Address List** at the bottom of the Address Book.

4 Double-click the names you want as primary (To) recipients of your message ▸ click **CC** ▸ double-click the names you want as carbon copy recipients ▸ repeat for blind copy recipients ▸ click **Close**.

**Tips**

- If you know the person's name, begin typing it in the To field of the item view. Name Completion searches the Frequent Contacts address book, the current address book, and the system address book, provided they are open. When Name Completion finds the person you want to send a message to, you can stop typing. If Name Completion finds a name that is close to but doesn't exactly match the one you are looking for, use the Up or Down arrows to scroll to adjacent names in the Address Book.
- To find an entry in an address book, click a Search List text box and begin typing. For example, begin typing a name in the **Name** column.
- You can also drag names to the Address List after clicking **To**, **CC**, or **BC**. To select one entry, click the entry. To select multiple entries, press **Ctrl** while clicking entries. To select all entries in the current address book (up to 1,000), click **Edit** ▸ **Select All**.

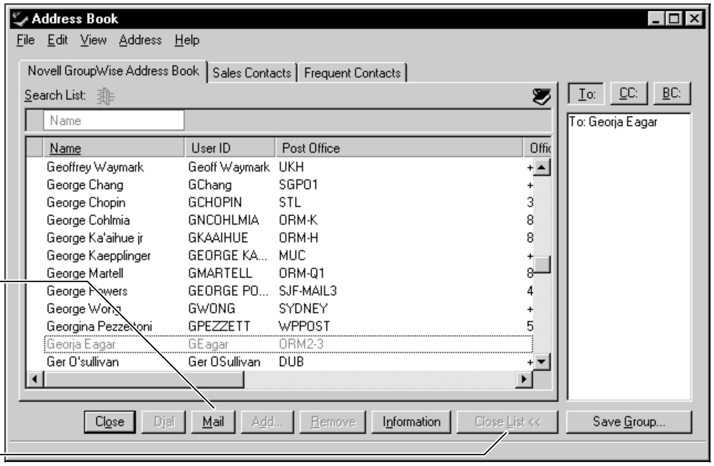
## Sending Mail from the Address Book

Use Mail to send items from an address book. If you have opened the Address Book from the Main Window, the Address Book and GroupWise are not connected. Mail lets you open an item view from the Address Book.

1 Click  on the toolbar.

*Click to open a new mail message view.*

*This button toggles between Close List and Address List.*




2 If the Address List is not visible, click **Address List**.

3 Double-click the users you want to send mail to.

4 To open a mail message view, click **Mail**.

> **Tips**
>
> - Users you specified are listed in the To, CC, and BC boxes in the item view.

# Using Frequent Contacts

Use the Frequent Contacts tab in the Address Book to access your most frequently used or most recently used entries. When you use an entry in a message, the entry is copied to the Frequent Contacts address book if it is open. You can view the date and time you last used an entry and the number of times you have used it.

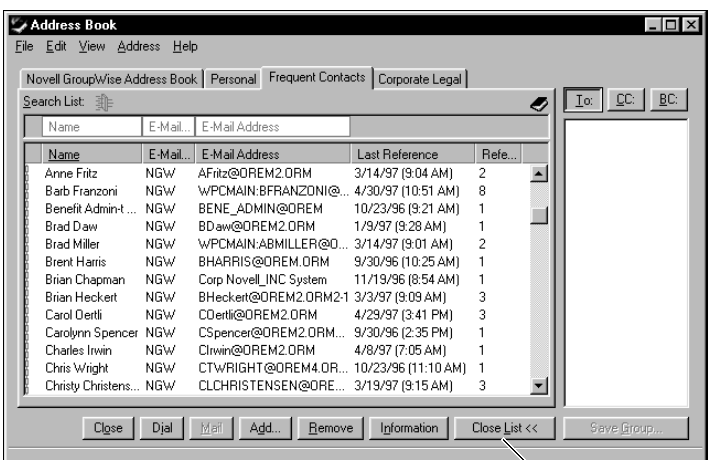
Once an entry is placed in Frequent Contacts, it remains there until you delete it from Frequent Contacts. The entry also remains in its original address book. If the Frequent Contacts address book is closed, no names and access information are copied to it.

## Using Frequent Contacts to Address Items

1 Open an item view.

2 Click Address.

3 If the Frequent Contacts tab is not displayed, click **File ▸ Open Frequent Book**.




*This button toggles between Close List and Address List.*

4 If the To, CC, and BC boxes are not visible, click Address List at the bottom of the Address Book.

5 Click To ▸ double-click the names you want as primary recipients of your message ▸ click CC ▸ double-click the names you want as carbon copy recipients ▸ repeat for blind copy recipients ▸ click Close.

**Tips**

- When you begin typing a name in the To, CC, or BC box, Name Completion searches the Frequent Contacts address book, the current address book, and the system address book, provided they are open. When Name Completion finds the person you want to send a message to, you can stop typing.
- You can remove address book columns or display other columns of information about entries. See *Displaying Different Information in the Address Book* under *Using the Address Book*.
- The Frequent Contacts address book can be closed, but it cannot be deleted.

## Using Predefined Filters for the Frequent Contacts Address Book

1 If you have not already opened the Address Book, open an item view ▸ click Address.

2 Click the Frequent Contacts tab.

3 If there is no Frequent Contacts tab, you must open the Frequent Contacts book. For steps, see *Displaying Different Information in the Address Book* under *Using the Address Book*.

4 Click View ▸ Predefined Filters ▸ Filter for at Least Three References.

*or*

Click Configure Filter for References ▸ type a number ▸ click OK.

**Tips**

- The number you type is the minimum number of references an entry must have in order to be included in the filter. A reference is the number of times you have sent or received items from an entry.

# Viewing Groups, Organizations, or Resources in the Address Book

Use Predefined Filters to display only groups, users, organizations, or resources in an address book.

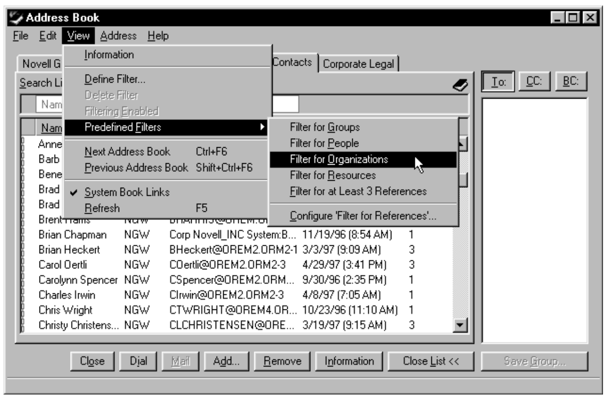
Address books display all entries by default. While all groups, companies, and resources are marked by icons, finding specific entries in large address books can prove difficult. A predefined filter displays only the type of entry you are looking for.

There are two predefined filters which apply only to the Frequent Contacts address book. You can use them to filter all entries with at least the number of references you specify.

To view groups, organizations, or resources in an address book,

**1** Click  on the toolbar.

**2** Click **View** ▸ **Predefined Filters** ▸ click the filter you want to display.



**3** To return to the non-filtered address book view, click View ▸ Filtering Enabled or Delete Filter.

**Tips**

- After a filter has been enabled, a check mark appears next to the Filtering Enabled option on the View menu and a yellow  appears in the upper-left corner of an address book tab.
- The Filter for at Least Three References and Configure Filter for References filters apply only to the Frequent Contacts address book. They let you filter out entries with less than three references or let you set the minimum number of references an entry must have to be included in the filter.
- The non-filtered address book displays all users, resources, groups, and organizations.
- The Address Book places icons by resources, groups, and organizations in all address books:

   Resources

   Groups

   Companies

# Using GroupWise Imaging

# Using Imaging: An Overview

The ability to convert paper-based information into a usable electronic format can free up your time and make you more productive. GroupWise® Imaging is an application which allows you to convert such information (for example, photographs, line drawings, and text documents) into digitized scanned images that can be sized and moved as well as annotated, e-mailed, faxed, or printed.

Depending on the file format, image files may contain one or more images and can be black and white, grayscale, or color. When loading and saving image files, system performance will vary according to the hardware being used and the image size.

## Supported File Types

Supported file types can be displayed, manipulated, and saved as either the same file type or a similar one. The following file types are currently supported.

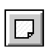
| File Type | Description |
|---|---|
| EVY | Envoy image |
| BMP | Bitmap |
| JPG | Joint Photographic Experts Group |
| AWD | Fax |
| DCX | PC Paintbrush |
| PCX | PC Paintbrush |
| XIF | Xerox Image Format |
| TIF | Tagged Image File Format |

**Tips**

- If you want to convert an image to a different file type, click File ▸ Save As ▸ click a file type from the Save As Type drop-down list.

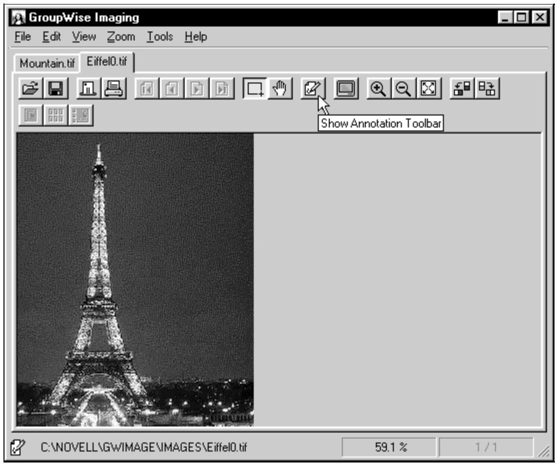
# Using Annotations

Annotations are electronic versions of the marks commonly used on paper-based documents, for example, highlights, rubber stamps, and text notes. However, because GroupWise Imaging annotations are digitized, they make adding, moving, and deleting editing marks much easier. Also, the attributes of digitized annotations (such as color, size, text, and visibility) can be more readily modified than paper-based.

| **Annotation Icon** | **Tool Name** |
|---|---|
|  | Annotation Selection |
|  | Straight Line |
|  | Freehand Line |
|  | Hollow Rectangle |
|  | Text from a File |
|  | Filled Rectangle |
|  | Highlighting Pen |
|  | Text |
|  | Attach-a-Note |
|  | Rubber Stamp |

## Displaying the Annotation Toolbar

1 Click  on the main toolbar.



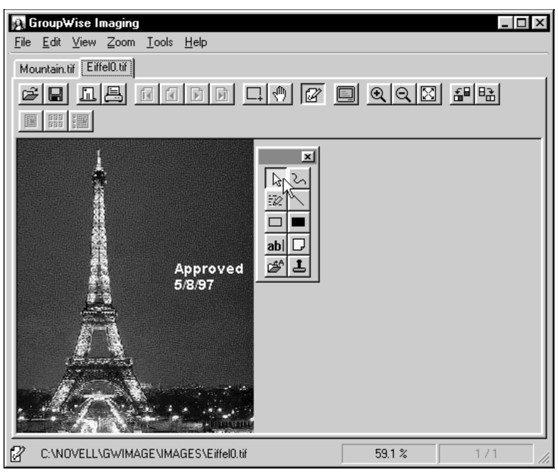

**Tips**

- You can also click View ▸ Show Annotation Toolbar.
- The annotation toolbar can only be displayed if the file type supports annotations.

## Selecting an Existing Annotation

1 Click  on the main toolbar.

2 Click  on the annotation toolbar.



3 Click an annotation.

> **Tips**
> - Any annotation you wish to move, modify, or delete must first be selected using this tool. Once the annotation is selected, it is redisplayed with handles. To resize the annotation, click a handle and drag the pointer.
> - The annotation toolbar can only be displayed if the file type supports annotations.

# Scanning

Scanning enables you to capture paper-based data as electronic images. A scanner is connected to a PC or network and is controlled by an application program. The application program communicates with the scanner through an interface called the scanner data source (driver), which is usually supplied by the scanner's manufacturer. The most common scanner data source is TWAIN. TWAIN is an industry-standard specification for image capture and is supported by most scanners.

## Selecting a Scanner

1. Click Tools ▸ Options.
2. Click Scanner.
3. Click Select Scanner ▸ scanner name ▸ OK.
4. Click OK.

> **Tips**
> - If you are using the Enhanced Version of Imaging, click ISIS or TWAIN after you select the scanner.

### Beginning a Scan

1. Click Scan ▸ New File.
2. Click Scan.
3. Click OK.

> **Tips**
> - No scan features will be enabled until a scanner is selected.
> - If your scanner uses a TWAIN driver, you may have to wait until you are prompted to insert the page.

# Opening an Existing Image

1. Click  on the main toolbar.
2. Click the folder you want to look in.
3. Click the filename.
4. Click Open.

> **Tips**
> - You can also open a registered file by right-clicking the file, then clicking Open.

# E-mailing an Image

GroupWise Imaging lets you e-mail images to other users to view, to add changes and annotations to, and so forth.

1. Click  on the main toolbar.
2. Type your password.  (A password will only be required if one was assigned during the creation of the Mailbox.)
3. Click OK.
4. In the To text box, type the names of the people you want to send the image to. If you need to look up names in the Address Book, click Address.
5. Click the Subject text box ▸ type a subject.
6. Click the Message box ▸ type your message.
7. Click Send.

**Tips**

- If the Send tool button is disabled, Windows® messaging has not been installed on your workstation.
- You can also e-mail a registered file by right-clicking the file, then clicking Send.

# Logging into GroupWise

# Logging into GroupWise

When you start GroupWise®, a dialog box gives you the opportunity to log in to GroupWise. The Startup dialog box changes, depending on the information GroupWise needs in order to open your Mailbox. For example, if you have a password on your Mailbox and log into the network and start GroupWise from your own machine, you may get a dialog box that asks for your password.

However, if GroupWise can't find the post office (for example, if the location of the post office changed or if the server containing the post office is currently out of service), you may get a dialog box that lets you specify the path to the post office or the TCP/IP address of the post office agent, your username, and your password.

You can use a startup option to force the Startup dialog box to be displayed when you start GroupWise.

## Logging into Your Mailbox

1 Make sure you are logged into your network.

2 Start GroupWise.

If you have not specified a password for your Mailbox and GroupWise needs no additional information, you will bypass the Startup dialog box and GroupWise will be displayed.

3 If you are prompted for a password or other information, type the password or required information in the appropriate box ▸ click OK.

**Tips**

- Other information GroupWise might require includes the TCP/IP address and port of the post office agent, the path to the network post office or the path to the remote database. If you do not know the required information, contact your system administrator.

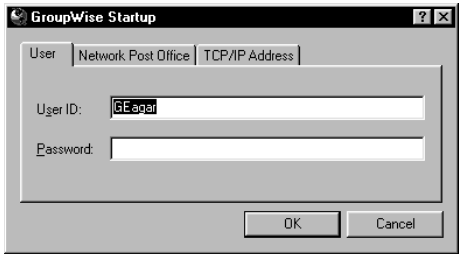
## Logging into Your Mailbox from Another User's Workstation

1 Log into the network with your own user ID.

*or*

To force the GroupWise Startup dialog box to be displayed, right-click the GroupWise icon on the desktop ▸ click Properties ▸ click the Shortcut tab ▸ in the Target text box, after the GroupWise executable, type a space, then type /@u-? ▸ click OK.

**2** Start GroupWise.




**3** Type your user ID if it is not already displayed in the User ID text box.

**4** Click the Password text box ▸ type your password ▸ click OK.

**Tips**

- You must be on the same post office as the other user to log into your own Mailbox from his or her workstation.

---

### Making Your Password Apply to Others Only

**1** Start GroupWise.

**2** Click the Password text box ▸ type your password.

**3** Click the Remember My Password check box ▸ click OK.

**Tips**

- Your system administrator can choose to disable Remember My Password for users on your system.
- This option is machine-specific, meaning that if you tell GroupWise to remember your password on one workstation, then log into another machine, you may be prompted for your password again. If you select the Remember My Password check box on the new workstation, GroupWise will remember your password on it also.
- You can also select Remember My Password in Security Options.

---

### Specifying the Path to the Remote Database

**1** Start GroupWise remotely.

**2** In the Startup dialog box, type your password.

**3** Click the Path to Remote Database text box ▸ type or browse to the path to the remote database. For example, you might type c:\remote.

*or*

If you do not have a remote database, type a path to where you want to have a remote database. When you click OK, you are prompted to create the remote database.

**4** Click OK.

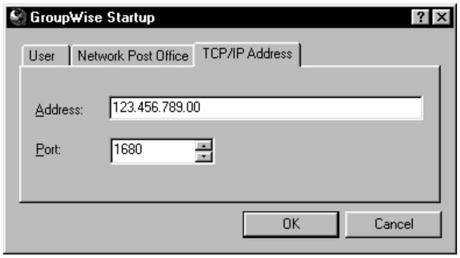
> **Tips**
>
> - GroupWise starts remotely if you have no network connection, if GroupWise fails after several attempts to connect to the Master Mailbox (for example, if the server that contains the post office is currently out of service), or if you use the /ps-<path> startup option.

---

## Specifying the TCP/IP Address of the Post Office Agent

**1** Start GroupWise.

**2** In the Startup dialog box, click the TCP/IP Address tab.




**3** Type the TCP/IP address of the post office agent.

If you do not know the TCP/IP address or port for the post office agent, contact your system administrator.

**4** Specify the post office agent port.

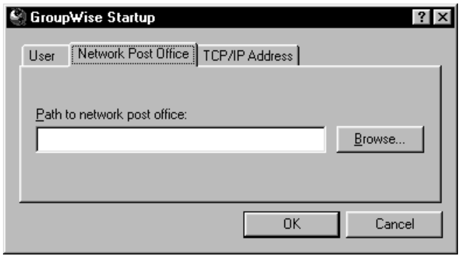
**5** Click OK.

> **Tips**
>
> - You can specify either the path to the network post office or the TCP/IP address of the post office agent. If you specify both, GroupWise checks the TCP/IP address first. If GroupWise cannot connect with the TCP/IP address specified, it tries to connect to the network post office with the path you specified.

## Changing the Path to the Network Post Office

1 Start GroupWise.

2 In the Startup dialog box, click the Network Post Office tab.




3 Type or browse to the path to the network post office. For example, you might type X:\PO.

If you do not know the path to the network post office, contact your system administrator.

4 Click OK.

**Tips**

- You can specify either the path to the network post office or the TCP/IP address of the post office agent. If you specify both, GroupWise checks the TCP/IP address first. If GroupWise cannot connect with the TCP/IP address specified, it tries to connect to the network post office with the path you specified.

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